

KEEPING YOUR FRIENDS CLOSE

Toward a Relationship Management Model for Young Alumni Donor Stewardship  
at Grinnell College and Macalester College

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Capstone

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### **About the Author**

Amanda Underwood holds a B.A. in English from Grinnell College and works in Donor Relations at Macalester College. This project grew out of Amanda's personal commitment to advancing the small liberal arts colleges of the Midwest and her academic interest in long-term relationship management strategies and loyalty marketing. In her daily work, Amanda focuses her efforts on major gift donors, and doesn't often work on communication strategies for young alumni. This capstone allowed her to explore her own demographic and gain a nuanced understanding about how to speak differently to donors at all levels. Amanda hopes this research will lead to more integrated communication efforts in the Advancement offices of small liberal arts colleges and more targeted outreach strategies for young alumni and millennial donors. When not thinking about giving, Amanda can be found spending time with her dog Piper and her partner Rachel at their home in Minneapolis.

## Executive Summary

**Issue:** Young alumni donor relationship management at Grinnell College and Macalester College

**Background and Importance:** Young alumni giving is critical to sustaining current philanthropic funding models at private liberal arts colleges nationwide. Major donors start out as young alumni giving only modest gifts, but little effort is expended to steward donors at the annual giving level. Donor retention is therefore critical for the long-term success of higher education advancement programs. Unfortunately, today's recent graduates are difficult to retain as donors, and their expectations about the donor-organization relationship differ from those of previous generations. At a time when education has never been more expensive, it is vital to understand the motivations for donor loyalty among young alumni.

**Purpose:** Exploration of young alumni donor mindset and identification of stewardship strategies to effectively manage donor retention and feed donor pipeline

**Research Methods:** This study applies a four-part stewardship model developed Kelly (2001) and elaborated by Waters (2010) to a target population of alumni within 10 years of graduation who have given at least once to their college. Focus groups (n=11) generated insights about the donor experience and a survey (n=190) provided data on donor values and evaluations of college performance on various stewardship tactics. A content analysis (n=116) examined current stewardship messaging from Macalester College and identified the most commonly used stewardship strategies.

**Discussion:** Research suggests that this group places the least importance on reciprocity tactics, but highly values institutional integrity. Above all, young alumni donors want to know that their gift supports an excellence student experience and they want evidence of what they make possible. In general, young alumni donors trust their colleges and are very proud to be affiliated with their colleges. Repeat donors tend to evaluate the college's stewardship performance better than inconsistent donors. Existing stewardship messaging emphasizes the reporting strategy above all else, but inter-coder reliability is low, suggesting that it is difficult to detect which strategies are present over others and how strategies interact.

**Recommendations:** Grinnell and Macalester should leverage student culture and student ambassadors to keep recent alumni connected to life on campus. Young alumni need to see that the culture they valued as students persists in the institution today and they want to see that they are supporting that aspect of their school. Indeed, young alumni want to know that their gift has a real impact, and they want to be told in concrete, realistic terms. Grinnell and Macalester need to make a stronger case for alumni support that puts the average \$20 in context. In addition, Grinnell and Macalester need to be careful with the mechanics of giving because inappropriate or tone-deaf message can easily turn off young alumni as they are still forming their opinions as donors. Lastly, the colleges should be more vocal about their responsible investment practices. It's very important to young alumni that they trust their schools, so transparency is vital.

## **Introduction**

The most valuable friend is one you already have. Relationships develop over time, and no one is likely to make big commitments to a stranger. So it goes with philanthropy. Most major donors to higher education start out as alumni and give small gifts at first, testing the waters. The challenge is how to nurture relationships that last, so that when alumni strike big—and some will—they’ve always had the college on their list of charitable priorities, and they’ve always been treated well as donors. The success of professional fundraisers therefore depends on effective alumni communications and donor stewardship programs. Here, the disciplines of fundraising and public relations bleed together. This study uses public relations theory to explore and assess the donor-institution relationship for young alumni of Grinnell College and Macalester College. With a particular interest in stewardship tactics, the researcher probed motivations and values related to repeat giving, and sought to identify key indicators of a satisfying donor experience. Then, armed with some indications of what young alumni donors want, the researcher analyzed existing donor and alumni messaging to evaluate how stewardship strategies are being used today.

## **Research Questions**

This research project asks, how do young alumni donors evaluate whether to give repeat gifts to their alma maters? In seeking to understand the ways that donors think about their emotional and financial commitment, the researcher also hopes to gain insights about what young alumni donors want to get out of the donor-organization relationship. Colleges and universities have their own agendas and desire specific behaviors or acts of support. Yet, it is less clear what donors—especially new donors—hope to gain from their relationship with the institution. Lastly, this research aims to explore current practices in stewardship communication

by asking how different stewardship strategies are employed in recent donor and alumni facing messages.

**R1:** How do young alumni donors evaluate whether to give repeat gifts to their colleges?

**R2:** What do young alumni want to get out of the donor-organization relationship?

**R3:** How are stewardship strategies currently used in donor and alumni communications?

### **Grinnell and Macalester: Similar Schools Share Giving Challenges**

This case study focuses on Macalester College and Grinnell College, two private, highly selective liberal arts colleges in the Midwest. Grinnell is located in rural Grinnell, Iowa, and has an enrollment of about 1,600 students. Macalester has an urban campus in Saint Paul, Minnesota, and an enrollment of about 2,000 students. Both colleges attract an international and geographically diverse student body, but maintain a sizeable Midwestern contingent. Known for their liberal cultures, rigorous academics, and tight-knit communities, Grinnell and Macalester attract the same kind of prospective student. Both schools offer generous financial aid, rank as top “feeder” schools for Ph.D programs, and graduate an impressive number of Fulbright Scholars (2014) and Peace Corps Volunteers (2014). By most measures of differentiation, the schools are very similar and so are their target constituents.

A challenge both colleges share is the quest to position themselves ever higher vis-à-vis their more prestigious peers. Grinnell and Macalester have risen in national acclaim over the past two decades, and now consistently rank among the nation’s top liberal arts colleges according to most measures. In the 2014 Best Colleges issue of U.S. News & World Report, Grinnell ranked 17<sup>th</sup> and Macalester ranked 24<sup>th</sup> among the nation’s 1,207 participating liberal arts colleges. What’s the difference between #17 and #1? On some measures, not much. But one of the

biggest areas for improvement is *alumni participation rate*, a key metric for tracking alumni engagement. Participation rates are calculated by taking the number of alumni donors in the most recent fiscal year and dividing by the total number of alumni for whom the institution has contact information (Council for Aid to Education, 2014). For fiscal year 2013, Macalester reported a participation rate of 39% and Grinnell reported 38%, significantly below the 45—50% achieved by their more highly ranked peers (U.S. News & World Report, 2013). For more context, U.S. News’s top ten schools “where alumni give back” included nine liberal arts colleges, all with enrollments below 5,000 and participation rates topping 50%. This is where Grinnell and Macalester would like to be (2013).

The researcher also has unique access to alumni from both Macalester and Grinnell through her status as a Grinnell alumna and Macalester employee. Because the two schools have similar cultures, face some of the same challenges, and are comparable in scale, this study uses representatives from both alumni communities as its primary population and sample. The intent of this study is not to directly contrast the two schools, but rather to combine the alumni bodies to achieve a robust sample suitable for meaningful analysis of young alumni donors at small liberal arts colleges in the Midwest.

### **State of Alumni Giving: Why Young Alumni Now?**

Charitable giving is big business, representing about 2% of GDP every year since 1972. Last year, individuals contributed \$228.93 billion to various charities and nonprofits in the United States. Grouped together, gifts from private individuals accounted for 72% of all charitable giving—far exceeding contributions from foundations or corporate sources. The

education sector receives the second largest share of all individual giving, outranked only by religious organizations (Indiana University Lilly Family School of Philanthropy, 2013).

For colleges and universities, alumni giving is one of the largest sources of charitable revenue. In 2013 alone, alumni giving totaled \$7 billion for higher education. The price of college tuition has never been higher, but colleges and universities continue to rely on philanthropic support to fund their everyday operations. This is especially true at private colleges, where alumni support makes up a huge piece of this pie – providing over a quarter of all voluntary support for education (Council for Aid to Education, 2014).

Of course, some alumni are more generous than others. In fact, at most academic institutions, about 90% of all fundraising revenue comes from only 10% of donors (Lodhi, 2013). With this in mind, fundraising professionals usually spend the great majority of their time building relationships with the wealthiest alumni and friends—the top 10%. Yet, most major donors were once young alumni, giving only modest gifts for unrestricted institutional support. Donor retention is therefore a critical component of the fundraising model for higher education, even at the lowest levels. Today's \$25 gift from a recent graduate might be tomorrow's \$25 million endowed scholarship. What, besides luck, can make the difference? Stewardship.

### **Stewardship: Where Public Relations Meets Fundraising**

Stewardship is the fundraising discipline concerned specifically with nurturing *previously established* relationships. Donors rarely self-identify the contact they receive as stewardship, but the practice concerns thanking donors and overseeing a program of communication that will encourage future interest in the organization (Greenfield, 1991). In many ways, stewardship is analogous to the investor relations function for corporate PR practitioners. Much more than



simply making donors feel good, stewardship is a strategic communications effort to reinforce the value of past contributions, stoke positive sentiment for the institution, and drive long-term investment. Although rarely joined to an outright solicitation, stewardship communications pave the way for new rounds of donor cultivation. The best stewardship plans are both ongoing and plugged into the lifecycle of individual donors, nudging them ever further down the path to future gifts. As Allison Lewis Lodhi notes in her recent article *Retention is the New Acquisition*, “An effective stewardship program is the solder that keeps donors in the pipeline and allows them to move from their first gift to consistent, significant giving” (2013, p. 1). The challenge is to identify the most effective stewardship strategies for an increasingly important constituency: young alumni.

As long as colleges and universities have existed, they have produced young alumni. There’s nothing new about this demographic bounded by age. Unfortunately, today’s young alumni are difficult to retain as donors, and their expectations about the donor-organization relationship differ from those of previous generations. At a time when education has never been more expensive and there have never been more nonprofit organizations competing for philanthropic dollars, it is vital to understand how to engage today’s young alumni (Troop, 2013).

### **Young Alumni: Millennials**

The young alumni population examined by this research roughly fits the emerging profile of the Millennial generation. Following the Pew Research definition, a Millennial is anyone born after 1980 (Taylor, 2014). Young alumni programming at colleges and universities across the United States tends to focus on those within 10 years of graduation. This case study adopts that

guideline by targeting those who graduated between 2003 and 2013. In other words, the audience is about 22 – 32 years old. These age boundaries align nicely with the Millennial demographic; those on the upper end of the spectrum – the 32 year olds—would have been born in 1982. The age of the Millennial donor is coming.

Broadly, Millennials are characterized by the intense economic challenges they face. “For the past four years, an average of just 63% of adults ages 18 – 29 were either employed or seeking employment, the lowest labor force participation rate for this age cohort since women” began entering the workforce decades ago (Taylor, 2014, p. 111). At the same time, college tuition fees have nearly tripled since the 1980’s, and the average student loan debt balance was \$25,682 in 2010 (Taylor, 2014). In addition to their dissatisfaction with economy, Millennials do not have great faith in the government and 50% consider themselves political independents. Young people today are getting married later, starting families later, and eschew religious affiliation in even higher numbers than previous generations. To put it bluntly—and Pew does—Millennials are “detached from institutions” (2014, p. 1). This could be bad news for colleges and universities—some of the oldest and dustiest institutions there are.

Yet, there’s also good news for the fundraising office: Millennials are poised to be part of the greatest intergenerational wealth transfer in history. According to a 2010 study from the Center for Retirement Research at Boston College, the Baby Boomer generation stands to inherit about \$8 trillion in coming years as their parents (the grandparents of Millennials) pass on (Johnson, Buttrica, Mommaerts). A 2012 report from Accenture goes on to speculate that the Boomers themselves will bequeath up to \$30 trillion to their own families after their deaths. Although it will be many years before the Boomers leave this world, their Millennial children will ultimately decide how to use that \$30 trillion. Thus, it is imperative that the nonprofit sector

focus on building and maintaining long-term relationships with Millennial constituents. They are quite literally the future of philanthropy.

### **Literature Review**

Much recent scholarly work has been focused on alumni donor acquisition and motivations for giving. Of particular relevance to the private college world was Liu's (2006) study on institutional prestige, which found that national rankings like *U.S. News and World Report's* Best College list, is "significantly associated with the proportion of total private giving" (p.132). Others have studied the impact of scholarship support on the likelihood of alumni giving. Meer and Rosen's (2012) research on the subject indicates that those who receive financial aid are, in general, less likely to give than those who do not.

Education and fundraising industry publications have long discussed the importance of alumni donor stewardship, even highlighting recent success at small liberal arts colleges (Masterson, 2010), but these journals usually base their data off of staff interviews and self-reported success metrics. Few researchers have attempted to study what constitutes an effective annual giving stewardship model for young alumni donors. One study that did explore donor motivations was McDearmon's (2010) qualitative look into the mindset of young alumni non-donors. McDearmon found that, for those who do not give, there was a desire for enhanced career services, gift incentives, and the ability to restrict gifts to specific areas of the institution. For McDermond's sample, gift incentives included both physical mementos like key chains and picture frames as well as intangible resources like library access or alumni email accounts. Yet, to date, no one has fully explored how to sustain relationships and ensure repeat giving for young alumni who have already made that first gift to their alma mater.

Fortunately, a few public relations scholars have approached the topic of stewardship and a model exists for examining the relationship between donors and their favored institutions. This study takes its inspiration from Kelly's (2001) four-part model of stewardship strategies that foster relationship growth: Reciprocity, Responsibility, Reporting, and Relationship Nurturing. Kelly's work builds on the ROPE public relations model developed by Hendrix (1998), but adds Stewardship as a critical fifth component, following Research, Objectives, Programming, and Evaluation. Kelly makes a strong case for the inclusion of Stewardship as a part of the PR process, especially for fundraising practitioners. In fact, Kelly suggests that fundraisers spend less than 10 percent of their time soliciting gifts, and instead focus their efforts on nurturing relationships (1998).

#### **Four Stewardship Strategies**

- Reciprocity
- Responsibility
- Reporting
- Relationship Nurturing

Waters (2010) expanded Kelly's strategies with operational definitions and created a method for measuring donors' evaluation of the donor-institution relationship. Both Kelly and Waters take original inspiration from Hon and Grunig's (1999) assertion that public-organization relationships can be measured by assessing four relationship categories: trust, commitment, satisfaction, and power dynamic. Using the newly augmented strategies, Waters surveyed 1,706 donors to three nonprofit hospitals in the western United States, as well as the hospitals' fundraising staff. In his surveys, Waters used a scale he had developed previously (Waters, 2009) to measure stewardship in the donor-institution relationship. The measures used are the ones recommended by Hon and Grunig, (2009) a 9-point Likert-style scale, ranging from strongly disagree (1) to strongly agree (9).

This research adopts Waters' measurement system and Kelly's four-part model of stewardship strategies to assess the value and performance of different stewardship tactics for the young alumni donor population at Grinnell and Macalester.

### **The Four Stewardship Strategies**

**Reciprocity:** For Kelly (2001) and Waters (2010), reciprocity is the essence of repaying obligations and demonstrating gratitude for gifts received. Conceptually, reciprocity is like the restoration of balance, a leveling out, a gesture that returns all parties to equal footing. In practice, reciprocity is usually demonstrated by the nonprofit organization acknowledging a donation with a legal receipt, and demonstrating gratitude through a thank you note or personal thanks. Reciprocity can include more complex forms of donor recognition like listing of a name on a donor wall or in a donor "honor roll" list. More personal and elaborate acts of thanks and recognition may be appropriate depending on the size of the gift and the nature of the relationship.

**Responsibility:** Kelly writes that "stewardship demands that organizations act in a socially responsible manner to publics that have supported the organization and its goals in the past" (p.285, 2001). Responsibility is characterized by keeping promises and being a good citizen of the community. Donors need to trust that the institution will act in accordance with its stated goals and use donor gifts as they were intended. Business decisions should benefit key constituencies, not betray public trust.

**Reporting:** Reporting refers to the imperative that institutions update donors on important successes and challenges facing the organization, as well as provide information on how donations have been used. This can include specific reporting on individual gifts, an

organization's annual report, as well as donor newsletters and other regular means of communications about institutional news and priorities.

**Relationship Nurturing:** By far the broadest category of Kelly's stewardship model, relationship nurturing encompasses a variety of efforts to keep key constituents close "at the forefront of the organization's consciousness" (2001, p. 286). Opportunities for relationship nurturing may include events, personal visits, customized communications, and participation in interest groups or communities associated with the institution.

This case study explores Kelly's four-part stewardship model as it applies to the field of higher education and the young alumni audience. The researcher predicted that focus group sessions would reveal donor sentiments and preferences that aligned with the four stewardship areas. Furthermore, the researcher predicted that alumni who have made more than one gift to their alma mater will have a higher estimation of how well their college has performed in those stewardship areas when compared with inconsistent donors in the same sample. Differences in evaluation between consistent donors and inconsistent donors may reveal areas for strategic improvement at Grinnell and Macalester

**H1:** Focus group sessions will elicit feedback about the donor-institution relationship that can be categorized according to the four stewardship strategies: reciprocity, responsibility, reporting, and relationship nurturing.

**H2:** Survey results will reveal that repeat donors judge their alma mater to perform higher on all measures associated with the four stewardship strategies when compared with inconsistent donors.

After completion of initial focus group sessions, the researcher formed a secondary hypothesis for the survey, as follows:

**H3:** Young alumni donors to Macalester and Grinnell will rank statements associated with reciprocity as less important than statements associated with other stewardship strategies.

### **Methods**

To explore possible stewardship strategies for Macalester and Grinnell, the researcher performed both qualitative and quantitative research on the target constituency, young alumni donors. As a first step, the researcher held focus groups to gather insights on how donors think about the donor-institution relationship. These insights then shaped the design of an online survey, which asked donors to evaluate different aspects of the donor-institution relationship, and their relative importance. Results from both of these efforts informed a content analysis of existing stewardship messaging from Macalester College. Participation in the focus groups was confidential to the extent that names and identifying information were not recorded in data collection. Participation in the online survey was anonymous.

### **A Note on Sampling**

As an alumna of Grinnell College and member of the Macalester college staff, the researcher has many friends and acquaintances who are alumni of both colleges. The sampling for both focus groups and the survey relied heavily on the strength of the researcher's personal networks and the good will of fellow alumni who were willing to recruit friends and friends-of-friends. The population and sample used for the content analysis was provided by colleagues at

Macalester and included material already in the researcher's possession by virtue of her profession.

## Focus Groups

Two focus groups were held at the researcher's home, each from 2:00 – 3:00 pm on Saturday, April 19, and Sunday, April 20, 2013. Six people participated in the Saturday session, and five people participated in the Sunday session. Participants were recruited via snowball sampling from among the researcher's friends and social network. Only known Grinnell and Macalester alumni were asked to participate. The researcher intentionally sought to include representatives from both Grinnell and Macalester in each group in order to steer conversation away from college-specific issues or programs and to stimulate discussion of shared values and concerns. Approximately 35 individuals were contacted directly by email or in person and asked to participate or pass on the invitation. The researcher also shared a recruitment post on her personal Facebook page and the Grinnell alumni social media network [Plans]. Sample recruitment messages are included in Appendix A.

In all, twelve participants committed to attend and eleven were able to attend the focus groups. All participants were graduates of Grinnell or Macalester College between the years of

### Criteria for Participation

- 1) Graduated from Grinnell or Macalester
- 2) From 2003 – 2013
- 3) Have given to your college at least once

2003 – 2013 and self-reported giving to their college at least once. Both groups were about half female and half male, and both were about 60% Grinnell alumni and 40% Macalester alumni. Each

focus group session opened with an invitation for participants to introduce themselves and state how connected they felt to their alma mater. Questions became more specific afterward and



focused on gift recognition, donor communications, institutional trust, and other aspects of the donor-institution relationship. Probing questions were asked when new and intriguing topics were raised by participants. Transcripts and interview questions are included in Appendix B.

## Survey

The researcher developed an online survey using Qualtrics and distributed the link via email and social media. Much like recruitment for the focus group, the researcher contacted approximately 30 individuals personally by email or through word of mouth, and asked them to participate and spread the link to fellow alumni. All individuals personally approached to take the survey were known Grinnell or Macalester alumni. Like the focus groups, the criteria for participation were: a) graduation from Grinnell or Macalester, b) between 2003 – 2013, c) have given to your college at least once. An example recruitment message is included in Appendix A. Data was collected from Friday, April 25 – Tuesday, May 6, 2014.

The survey included 20 questions, with a screener question asking about their giving history. Individuals who said they had never given to their college were automatically excluded from the rest of the survey. 190 surveys were started, 151 completed, and 140 were taken in their entirety—by individuals with the necessary giving history. The survey took about 10 minutes on average and included almost entirely multiple choice questions. A full report of survey questions and results is included in Appendix C.

*190 responses*  
*151 surveys completed*  
*140 with prior giving history*

The first four questions were multiple choice and asked about age, graduation year, giving history, and participation in a “senior class gift” drive—a popular tactic at private colleges to inspire a culture of philanthropy. The heart of the survey was a set of five questions (Q6, 9,

15, 17, 19) that asked participants to rank 41 different statements on a 9-point Likert scale (1-Strongly Disagree to 9-Strongly Agree). This set of questions was based off of Waters' (2010) research on stewardship strategies for hospital donors. Each of the 41 statements was developed to correlate with one of the four stewardship strategies—reciprocity, responsibility, reporting, and relationship nurturing.

The first two questions in this set were intended to measure the perceived *value* of each strategy to the participant, and began with the prompts “It is important to me that” and “It is important to me that my college.” The second two questions in this set were intended to evaluate stewardship strategy *performance* and began with the prompt “To what extent do you agree or disagree with the following statements?” All four of these Likert questions included eight or nine statements, with at least two corresponding to each stewardship strategy per grid. The order of the statements was randomized via Qualtrics to minimize any primacy or recency bias. The last question in this Likert scale set asked participants to assess how specific stewardship tactics would influence their likelihood to continue giving. For this question, nine statements were provided and most related to the relationship nurturing stewardship strategy. The statements for this question were developed from insights gathered during the focus group stage.

The next set of three questions recorded potential indicators of high or low donor engagement, also developed from insights gathered during the focus group sessions. This was followed by a set of two questions that addressed motivations and aspirations, asking where donors would like to see their money go and how they would like to be thanked. Two open-ended questions were provided at the end of the survey, one for anyone who indicated that they used to give but have stopped giving, and another broad question asking what the college should

do to get the donor more excited about giving. Lastly, the survey closed with basic demographic questions on employment status and personal income.

### **Content Analysis**

After completing the focus group and survey, the researcher performed a content analysis to evaluate how often the Kelly's (2001) four stewardship strategies were used in current young alumni donor messaging. The content analysis focused on messaging from Macalester because the researcher had access to a large sample of recent communications. An initial inquiry was sent to a colleague at Grinnell, but a sample of comparable scale could not be assembled in time to be included in this study.

The population for analysis encompassed all print and email communication with stewardship messaging that could have touched a young alumni donor within the past year. To assemble a sample, the researcher first interviewed one of Macalester's Associate Annual Fund Directors and learned how stewardship messaging fits into larger communications plans and strategies within the Advancement department. A transcript of this interview is included in Appendix D. With assistance from the Associate Annual Fund Director, the researcher compiled an approximate census of all print and email communication produced by the Annual Fund and Communications offices at Macalester that could be considered to have a stewardship function. The sample was then narrowed down to only those items that were sent to an audience including alumni donors within 10 years of graduation.

From the focus groups, the researcher learned that alumni do not necessarily discern between communications sent only to donors and communications sent to the whole college community. With this in mind, the sample was intended to include messages with both obvious

and latent stewardship content. The sample included only print and email messages because samples from other channels of communication (telephone call logs, in-person conversations, videos, events) were unavailable or impractical to study under the same research conditions.

The sample used for content analysis contained 116 messages, drawn from a variety of materials sent at some point between May, 2013 and April, 2014. The sample included message units from the following sources: 31 articles from the alumni magazine, 25 stories and data sets from the annual report, 26 solicitations and pledge reminders, 11 thank you messages and gift receipts, 8 donor e-newsletters, 12 alumni e-newsletters, and 3 other miscellaneous messages. It is important to note that one donor could not have received all of these messages in one year because the sample includes content created specifically for Macalester's *sustainers* – donors with ongoing monthly contributions – as well as content specifically for non-sustainers. The researcher included both types of content in order to capture the broadest range of messaging used by Macalester. Sample message units are included in Appendix E.

The researcher and another trained coder analyzed all message units on Friday, May 16, 2014. The content analysis used apriori coding categories to determine the primary and secondary stewardship strategy employed by each message unit (if any). The stewardship strategies used for coding are the same as those developed by Kelly (2001) and used in previous research in this study. To review, the four stewardship strategies used for coding were: reciprocity, responsibility, reporting, and relationship nurturing. Coders also identified the primary voice of the message (ex: student, president, advancement leader, etc.) and the degree to which each message conveyed a vivid description of the everyday student experiences. These later coding categories were explored because of insights generated by focus group and survey research. A copy of the coding guide is included in Appendix F.

## Results

### Focus Group

Focus group sessions allowed the researcher to collect detailed, in-depth insights on a subjective and personal level. From individual responses, the researcher was able to put together a picture of the nature and structure of attitudes about repeat giving and the donor-institution relationship. Insights are clustered into the major themes below. Please see Appendix B for focus group transcripts.

### The Thanking Process

In general, participants reported that their gifts were promptly acknowledged, but several focus group members felt they were “over-thanked” for their gifts. In part, this seemed related to the size of the gift; respondents didn’t want to be thanked multiple times or too generously for a modest gift. The underlying assumption here is that larger gifts deserve big thanks, but smaller (\$10 and \$20 were commonly quoted figures) gifts are not worthy of the organization’s resources.

*“I’m always thanked like eleven times and I’m always uncomfortable with it because I give all the time and it’s not that much money. It feels overkill.”*

One focus group member explicitly made the connection between being thanked and the costs associated with the thanking process: “I really wish they’d stop sending me so much mail—it’s expensive and wasteful.” Another participant added, “I don’t really care if they thank me at all. I expect that once a year call and that’s fine, but beyond that it’s frivolous.” Focus group participants were almost unanimous in their rejection of printed donor “honor roll” lists, but some appreciated a web-based listing of donors for their class year. The researcher considered responses in this category to be aligned with the reciprocity aspect of stewardship because they revolved around gift acknowledgement and thanking.

### **Culture of Philanthropy—or Not**

In both focus groups, participants independently commented on a culture of giving. One participant, a Macalester graduate, made a connection with this. She learned about giving back through her involvement with her major while still in school, noting, “There was a strong culture of giving back in Econ. We had alums come back and talk about alumni lives and giving.” A few others echoed that sentiment, but just as many participants—typically, Grinnell alumni—described feeling pressured not to give by fellow alumni. “There’s pressure to stick it to the man and not give” said one participant, when asked about the influence of fellow alumni on his/her giving. A participant from the other focus group session elaborated on this point, saying she welcomes some reports about alumni giving because “it normalizes [giving]...seeing how many other people give reinforces that it’s okay and normal and important for me to give.” It seems that both colleges have established the expectation of giving, but not necessarily wide community support for giving. Stories about giving may not be receiving enough prominent placement in broad communication channels.

### **Access to Students and Student Experience**

Many focus group participants had experience being solicited by and giving in response to student telemarketing callers – a practice known as “phonathon” at some colleges. While a few found the frequency of calls irritating, most participants said they enjoyed the calls because they provided an opportunity to engage with current students. Some in the groups had experiences working at phonathon, but none had been long-term phonathon student employees.

Recalling his most recent conversation with a student, one participant commented, “I really enjoyed my phonathon call. I like talking to the students. They asked me for sage advice.

We talked for almost half an hour and after that conversation they asked me to give and I thought, yes, I could spare a few dollars.” Although they said it in different ways, almost all

*“When the students call, I give because I want us to have a shared experience”*

focus group participants suggested it was important to them to ensure that current students enjoy the same campus culture that they experienced during their time. In this sense,

direct student-donor contact provides both evidence of what alumni donors are supporting and an opportunity to perpetuate the most valued aspects of their college experience. The researcher considered responses in this category to be aligned with the relationship nurturing aspect of stewardship because they demonstrated an emotional connection and allowed donors to make a meaningful connection between their affiliation with the institution and its ongoing mission.

### **Issues of Trust and Pride**

When asked if they thought their gifts were used responsibly by their colleges, the majority of respondents answered that they trusted their college. Participants expressed some uncertainty about their agreement with college priorities—ex: new buildings, dedication to need-blind admissions—but overall, they had faith that their colleges would make wise decisions with regards to donor funds and general policy. This may be related to the high level of pride exhibited by all participants and their stated interest in seeing their college mentioned “in the same breath as Bowdoin, Middlebury, etc.” Respondents indicated that it was not important to them that their colleges rank at the very top of nationally published evaluations, but they overwhelmingly judged their education as high quality and wanted their alma maters to be considered on par with other academically prestigious liberal arts colleges. This pride may translate into some degree of loyalty and fast-track decision making regarding how to evaluate giving. In other words, if they respected the college enough to enroll, they should still trust it

now. In fact, when probed further, some participants said it never occurs to them to question the integrity of financial decision at their colleges. This finding contrasts somewhat with the insight below about restricted giving. The researcher considered responses in this category to be aligned with the responsibility aspect of stewardship because they reflected trust in the institution.

### **The \$50 Mystery and Restricted Giving**

Although participants largely trusted their colleges, they couldn't necessarily say what the institutions did with their gifts. One focus group member stated that he/she "would love to be able to direct my donation to a specific department or project, or get some sort of information about a concrete thing I'm supporting. \$50 does what for the college? I don't really know what my money does. I want to hear what the impact is." Although it was not planned as part of the moderator's script, both focus group sessions ended up having small discussions about the idea of a Kickstarter-style restricted giving opportunities, where alumni could choose to fund specific projects or student initiatives and then receive information about the outcomes. Another person told a story about being asked for a \$781 gift immediately after graduation and being so offended that she didn't give for years. This comment led to a brief discussion about what difference a \$20 gift can make and how colleges can come off as "tone deaf" if they only ask for high dollar gifts and don't connect the dollar amount to a tangible outcome. The researcher considered responses in this category to be aligned with the reporting aspect of stewardship because they demonstrated a need for clear feedback on the use of donor funds.

*"As a donor, I just feel like I'm a line in a spreadsheet. There's nothing unique about my donations to Grinnell."*



### **Strength of College Affinity and Alumni Community**

About half of participants indicated that they felt connected to an active alumni community, but usually through friendships or informal networks. Everyone reported that they felt well informed about current events and college news, though some consumed more college media than others. All felt confident that they knew how to find information if they wanted it. Some respondents reported volunteering or attending events at their college in the recent past, and described these experiences as positive. There was unanimous agreement that volunteering and attending events deepens the alumni connection to the college and increases interest in giving and long-term support. One participant suggested that she would like fundraising staff to acknowledge her volunteer time as well as her monetary gifts. The researcher considered responses in this category to be aligned primarily with the relationship nurturing aspect of stewardship, but also reporting, since inclusion in the alumni community implied an understanding of current college affairs (communicated via reporting functions).

### **Survey Results**

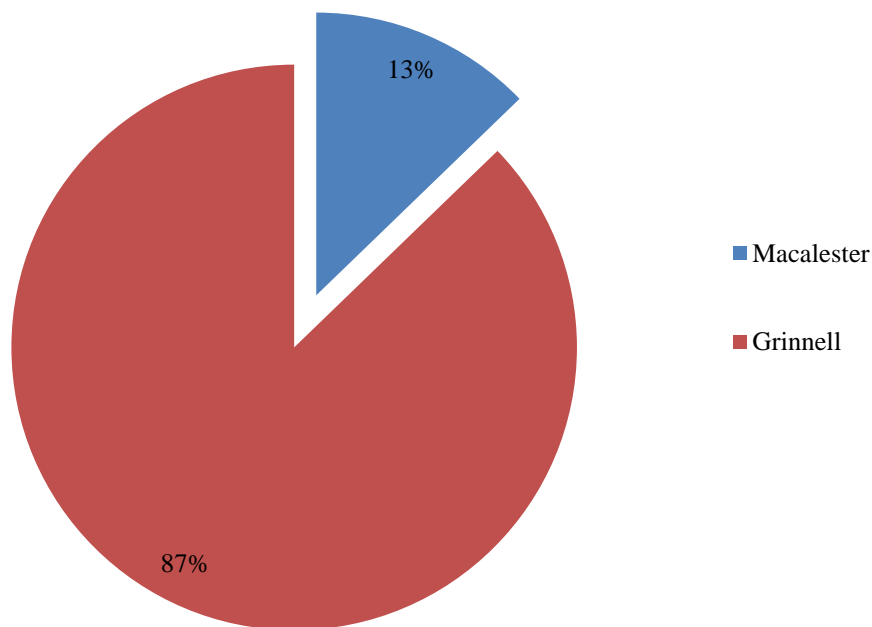
Many of the insights generated during focus group sessions were used to design the survey questions, especially those developed to correspond to each of the four stewardship categories. A few additional survey questions tested participants' responses to popular tactics expressed during the focus groups (ex: restricted giving).

Survey respondents were all between age 22 and 34, with the median age being 26. The group was 74% female and 25% male. Sixty-two percent of respondents were employed full time, 7% part time, and 28% were full time students. In all, 87% of participants identified as Grinnell alumni and 13% identified as Macalester alumni (Figure 1). Annual income was varied,

with 6% of respondents making over \$100,000 and 28% making less than \$20,000 (this 28% includes most of the full-time students). The majority of participants, however, earned between \$20,000 and \$60,000. Respondents therefore represented a breadth of ages within the target population, as well as a diversity of employment experiences and salary ranges. Geographic location was not tracked, but because survey distribution happened primarily online, the geographic range is much broader than the focus groups.

**Figure 1**

Proportion of Survey Respondents Affiliated with Each College



### Responsibility is the Most Valued Stewardship Strategy

When asked to evaluate how strongly they agreed or disagreed with the importance of statements associated with each of the four stewardship strategies, respondents overwhelmingly identified responsibility strategies as the most important. The average rating for all statements was a 6, representing slight agreement that the statement was important. For Responsibility strategies, the average scores ranged from 6.89 to 8.25, suggesting strong agreement. These statements also received the greatest intensity of agreement, attracting the highest numbers of “Strongly agree” responses. Table 1 illustrates the breakdown in survey responses evaluating responsibility strategy statements.

**Table 1**

Survey Responses Evaluating the Importance of Responsibility Strategies

Responsibility Statements	Strongly Disagree					Strongly Agree				Mean
	1	2	3	4	5	6	7	8	9	
Keeps its promises about how it will use alumni gifts	0%	0%	0%	1%	3%	4%	14%	21%	58%	8.25
Acts in a socially responsible manner when using alumni gifts	1%	0%	0%	0%	2%	3%	16%	24%	54%	8.2
Considers my opinions when planning how to use my gift	2%	0%	2%	4%	7%	20%	25%	19%	20%	6.89
My gift is used for the purpose I intended	1%	2%	0%	1%	7%	10%	20%	17%	43%	7.6

### Reciprocity is the Least Valued Stewardship Strategy

On the other hand, reciprocity was the least valued stewardship strategy according to respondents. Out of the four reciprocity statements, only one received more than 50% of votes on

the agreement side of the scale. For the other three reciprocity statements, respondents either didn't care, or rated them as somewhat unimportant. 55% of respondents agreed to some extent with the statement "It is important that my college acknowledges my gift in a timely manner." By comparison, the mean value for the reciprocity statement measuring the importance of "swag" items like key chains was very low, at 3.75. Table 2 illustrates the breakdown in survey responses evaluating reciprocity strategy statements.

**Table 2**

Survey Responses Evaluating the Importance of Reciprocity Strategies

	Strongly Disagree								Strongly Agree	
Reciprocity Statements	1	2	3	4	5	6	7	8	9	Mean
Thanks me for giving with small perks like a keychain or card at the holidays	26%	13%	10%	10%	14%	15%	6%	3%	3%	3.75
Considers me a friend	6%	7%	6%	8%	22%	21%	13%	9%	7%	5.35
Acknowledges my gift in a timely manner	6%	4%	6%	9%	21%	20%	16%	9%	11%	5.66
My name is included in an "honor roll" of donors during years when I give	23%	14%	10%	4%	17%	12%	9%	2%	7%	4.07

### Stewardship Performance is Mixed

Evaluations of the performance of stewardship strategies were across the board (See Figure 3). Overall, donors rated their colleges about a 6 on responsibility strategies, and about a 5.5 on reporting strategies. Responses regarding reciprocity and relationship nurturing were more varied, with relationship nurturing highlighting success in some areas, but not others. An

impressive 95% of respondents agreed to some extent with the statement “I proud to be an alum of my college,” and 57% agreed strongly.

A few questions proved to be more divisive. About 11% of participants strongly agreed that their college only contacted them when it wanted money, but 11% strongly disagreed. Responses for this particular question were almost perfectly distributed, suggesting that the colleges currently balance solicitations with other communications just enough to appease most young alumni donors. A similar breakdown occurred in response to the statement “I know how my college uses alumni gifts.” Roughly equal numbers of participants agreed and disagreed all along the spectrum.

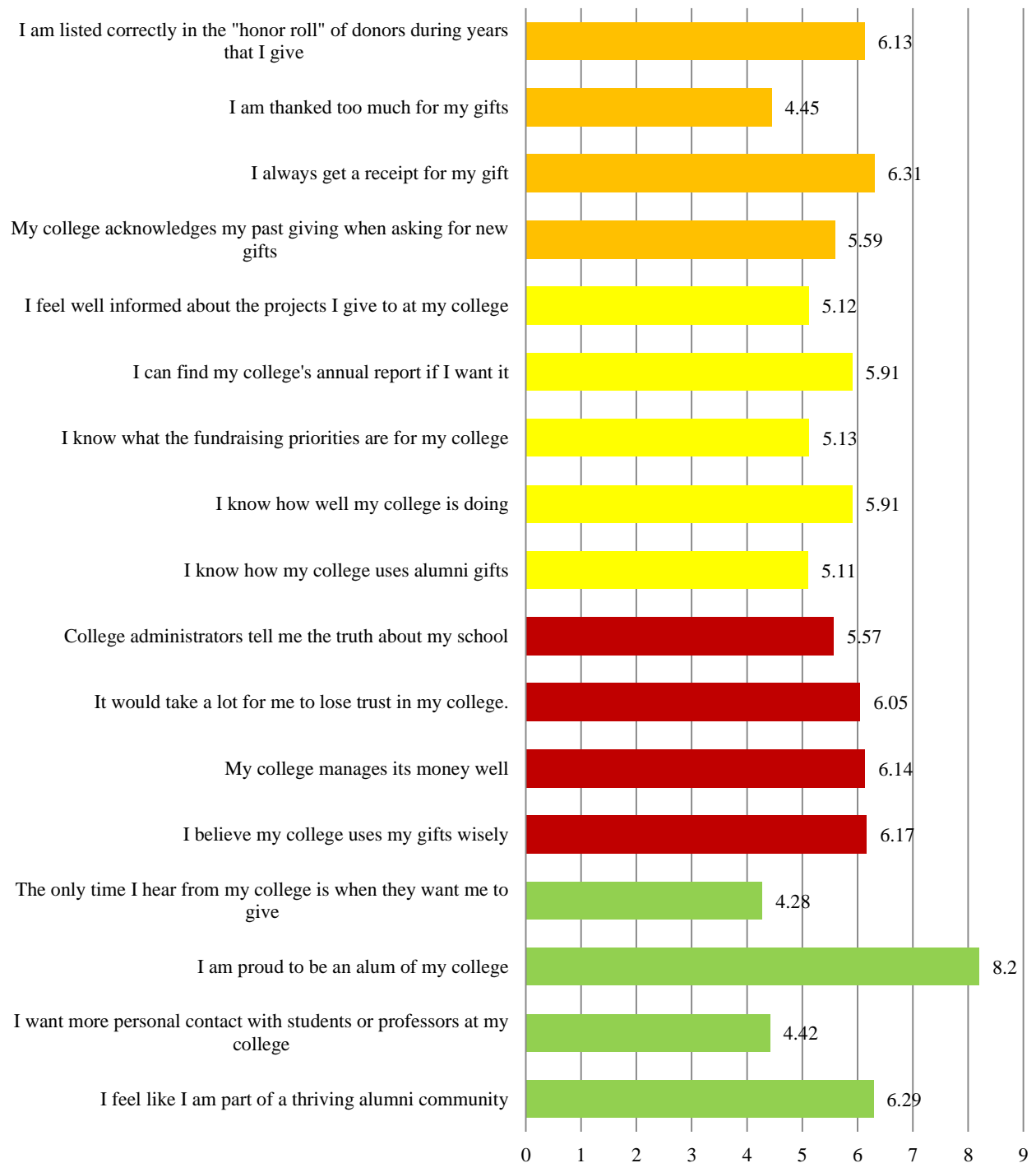
Survey data also fleshed out some insights generated from the focus groups. Thirty-one percent of participants said they wanted more contact with students or professors at their college, echoing sentiments heard in the focus groups, but suggesting that the demand is largely being met by existing communication strategies. When asked if they were thanked “too much” for their gifts, 31% of respondent’s didn’t have an opinion, 26% agreed that it was too much, and 43% disagreed. This result somewhat contradicted feedback from the focus groups, showing that most donors are not put off by the current degree of gratitude their college expresses for their gifts.

**Figure 2**

Mean Donor Evaluations of Stewardship Tactics on Likert Scale

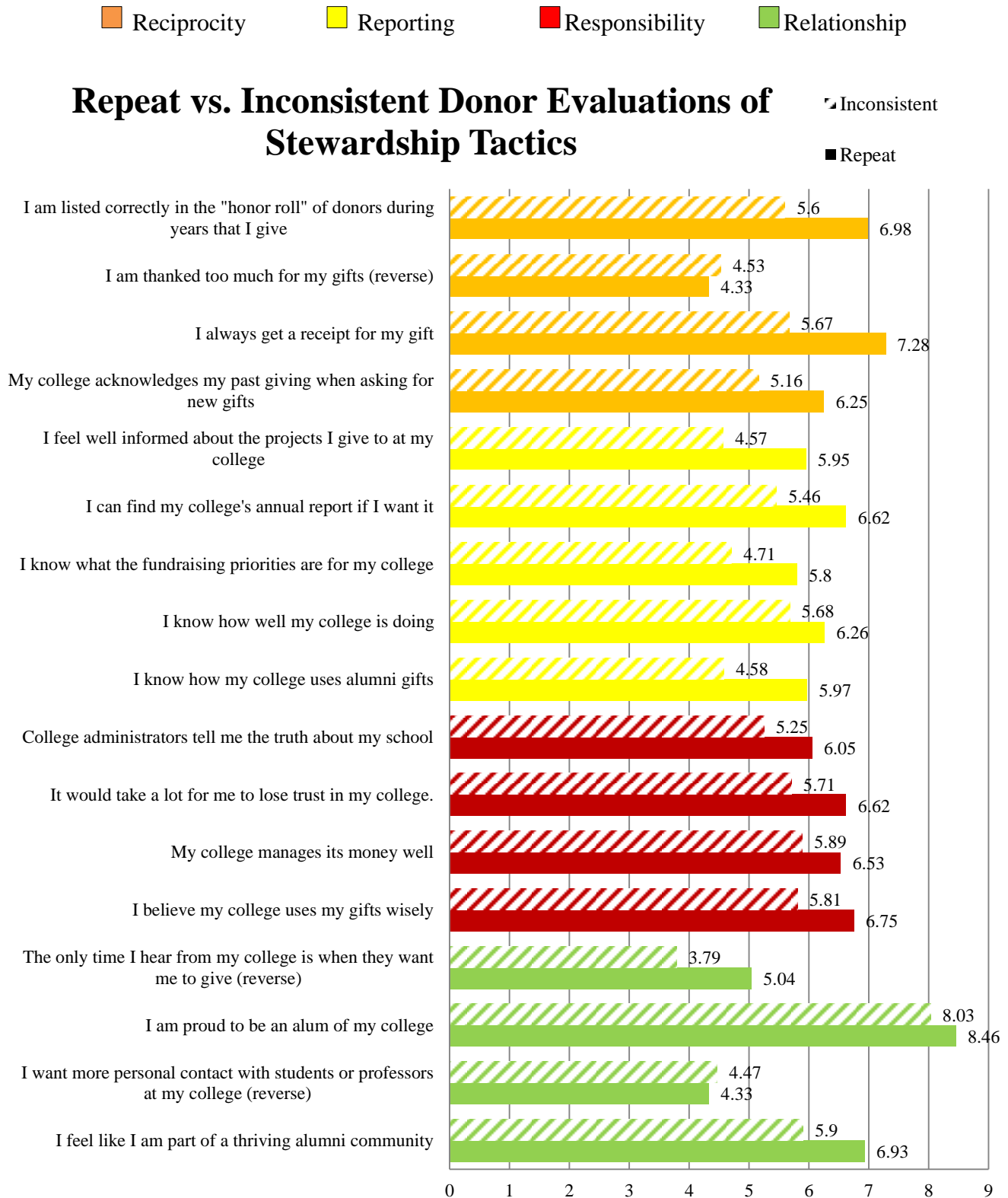
■ Reciprocity    
 ■ Reporting    
 ■ Responsibility    
 ■ Relationship Nurturing

## Mean Donor Evaluations of Stewardship Tactics



**Figure 3**

Mean Donor Evaluation of Stewardship Tactics on Likert Scale - *Repeat Donors vs. Inconsistent Donors*



In addition to evaluating stewardship values and performance, the survey offered an opportunity to gather feedback about some specific stewardship tactics. Participants responded positively to all suggested tactics except two about reciprocity. The standout tactics that generated the best results—an average 6.82 and 6.7 on the 9 point Likert scale—were both related to relationship nurturing. Participants reported being most likely to consider giving more regularly if they “felt like the college was working on issues [they] cared about” and if they “had the option to direct [their] giving to a specific area.”

Some of the survey questions were intended to assess if certain behaviors or preferences would correlate with giving behavior. Selected results from these questions are highlighted below:

- 59% of respondents reported giving as part of a “senior challenge”
- 59% attended an event organized by their college
- 36% volunteered in the past year
- 33% would prefer to be thanked by students for their gift
- Young alumni want their gifts to fund financial aid and scholarships more than anything else

For those who give every year (n=61), stewardship performance evaluations were an average of 0.9 points better than those of inconsistent donors; the average rating was 5.34 for inconsistent givers vs. 6.24 for repeat donors (See Figure 3). This was largely because of a higher percentage of “strongly agree” responses from the consistent givers. The difference between repeat and inconsistent donors was most pronounced on strategies related to reporting, possibly because giving more gifts means being exposed to more messaging about how gifts are used (See Figure 4). These results support the **H2** hypothesis that repeat donors will judge their alma mater to perform better on all measures associated with the four stewardship strategies.

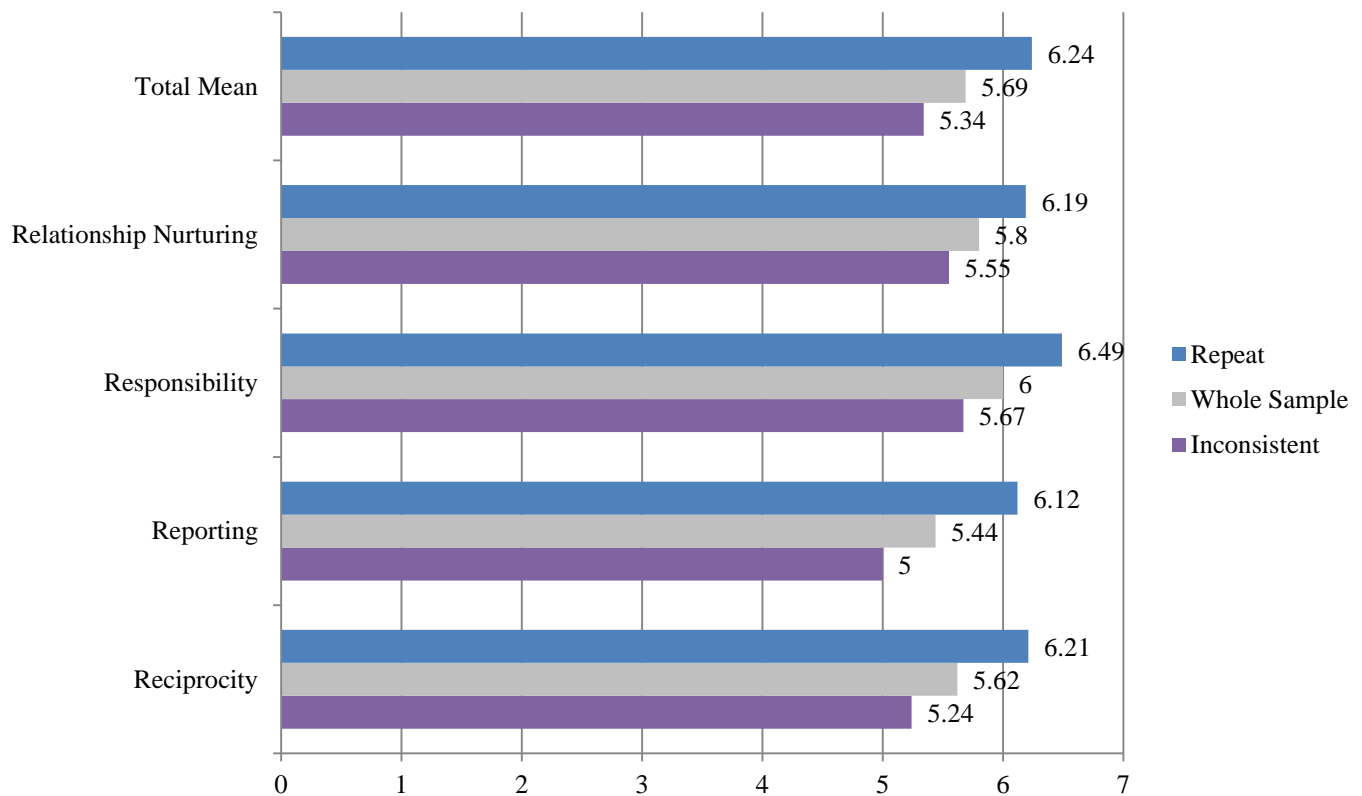


**Figure 4**

Mean Donor Evaluations of Four Stewardship Strategies and Overall Mean Evaluations

*Presented as a Comparison of Repeat Donors, Inconsistent Donors, and the Whole Sample*

### Mean Donor Evaluations of Stewardship Strategies



### Content Analysis Results

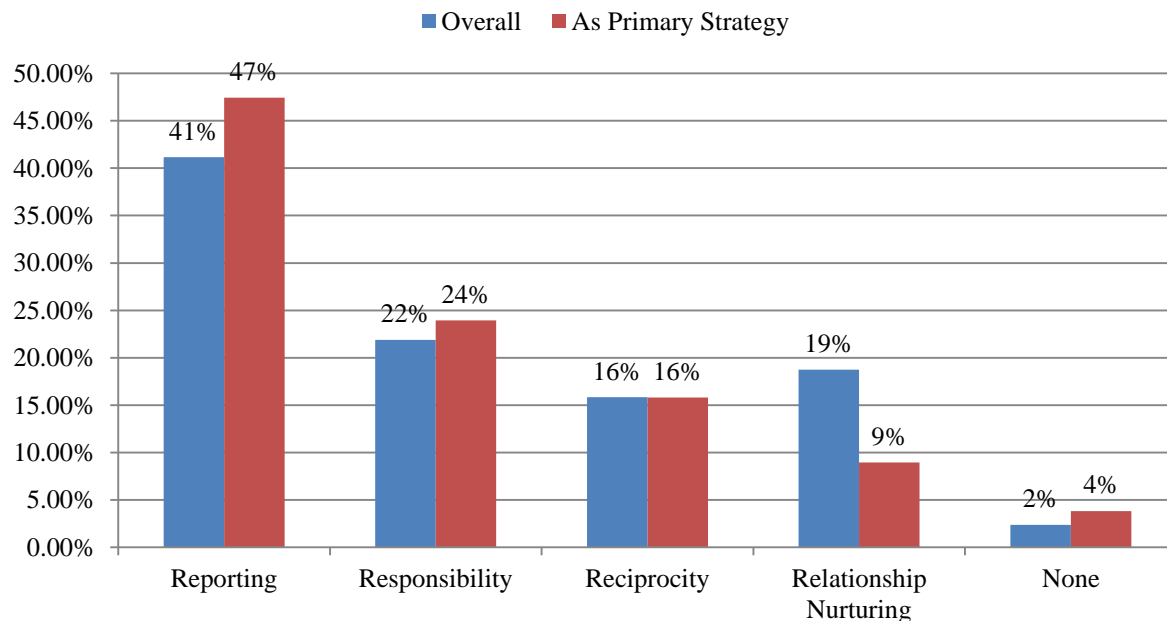
Content analysis of donor and alumni communications revealed how stewardship strategies are currently being used by Macalester in donor and alumni communications. For 116 sample messages, trained coders identified the presence of primary and secondary (if any) stewardship strategies out of the four-part model proposed by Kelly (2011) and used in other

aspects of this research. Two trained coders evaluated all messages, and intercoder reliability for stewardship strategy identification was calculated to be 54% using the Holsti method.

When scores were averaged, coders judged that 41% of messages used reporting strategies, 22% used responsibility strategies, 16% used reciprocity strategies, 19% used relationship nurturing strategies, and 2% contained no discernable stewardship strategy. Looking only at the primary stewardship category, coders found that 47% of messages used reporting strategies, 24% used responsibility strategies, 16% used reciprocity strategies, 9% used relationship nurturing strategies, and 4% of messages did not contain a stewardship strategy. These results suggest that reporting is by far the most commonly used stewardship strategy in the sample, and relationship nurturing—while often present—tends to play a back-up role. Figure 5 illustrates of these results.

**Figure 5**

Proportion of Sample Messages Judged to Contain Each Stewardship Strategy



To examine how stewardship strategies work together, the researcher compared the number of times the same two strategies were identified together in one message. Tables 4 and 5 demonstrate this analysis. Regardless of primary/secondary status, the most commonly identified pair was reporting and responsibility, with a total of 44 occurrences over the 234 total coded results. With regard to primary/secondary status, reporting and relationship nurturing appeared most often, with reporting in the primary slot and relationship nurturing in the second. This finding is congruent with the observation above that reporting is the most common primary category and relationship nurturing features mostly as a secondary element.

**Table 3**

Frequency of Strategy Interaction as Identified by Coders

*Out of 234 secondary/primary pairs generated with 116 samples. Primary strategy selections are presented on the vertical axis, secondary are presented on the horizontal axis.*

	<b>Reporting</b>	<b>Reciprocity</b>	<b>Responsibility</b>	<b>Relationship Nurturing</b>
<b>Reporting</b>	X	15	25	29
<b>Reciprocity</b>	18	X	1	8
<b>Responsibility</b>	19	6	X	12
<b>Relationship Nurturing</b>	8	2	1	X

**Table 4**

Frequency of Strategy Interaction as Identified by Coders—Regardless of Primary/Secondary Status

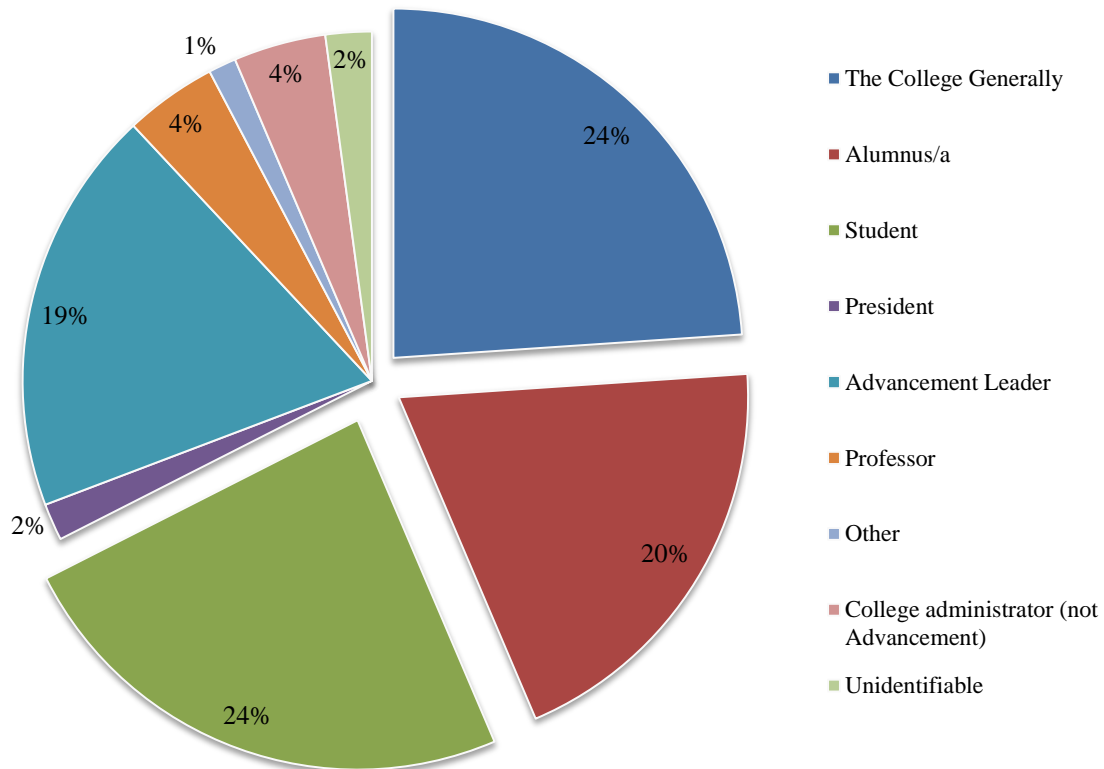
*Out of 234 secondary/primary pairs generated with 116 samples*

Strategy Pairs	Frequency
Reporting + Reciprocity	33
Reporting + Responsibility	44
Reporting + Relationship Nurturing	37
Reciprocity + Responsibility	7
Reciprocity + Relationship Nurturing	10
Responsibility + Relationship Nurturing	13

Coders also examined the voice of each message and the degree to which each message portrayed the everyday student experience. Most messages in the sample were identified as using either the voice of a student or the voice of the college at large. Students and “the college generally” both made up 24% of the sample. The next largest presence was the voice of the Advancement staff, appearing in about 20% of the sample. Other voices detected included those of alums, other college administrators, the president, and professors, but none of these characters appeared in more than 5% of messages. Figure 6 illustrates the proportion of Macalester voices identified in the sample. The degree of student experience presented by each message varied greatly, as 57% of messages scored low with a 1 or 2, 21% messages scored a middling 3, and 20% of messages scored a 4 or a 5.

**Figure 6**

Proportion of Sample Messages Identified with Various Macalester Voices

**Macalester Voices Identified in Message Sample**

## Discussion

This study has provided insight on the way that young alumni donors think about their relationship with their alma maters and how they evaluate different kinds of donor communication tactics. The results have shed some light on the questions asked at the outset of this study.

### Revisiting Initial Research Questions

The impetus for this research was a set of questions regarding the behaviors and needs of young alumni donors as well as the content of current donor and alumni messaging. Research questions are restated below for review.

**R1:** How do young alumni donors evaluate whether to give repeat gifts to their colleges?

**R2:** What do young alumni want to get out of the donor-organization relationship?

**R3:** How are stewardship strategies currently used in donor and alumni communications?

For Grinnell and Macalester, young alumni who have already given a first gift seem to be looking for their colleges to demonstrate continued investment in the distinctive qualities that made their education valuable. These qualities are both academic and cultural, and the character of these selective schools appears to be tightly tied to the personalities of the alumni they graduate. In focus group sessions, the decision to make a repeat gift was often described in inverse terms—“They’d have to do something pretty terrible for me not to give” said one loyal alum. Not all alumni feel so strongly, but, for current young alumni donors, it seems that the decision to give regularly is not so much based on conscious appraisal of the college’s progress, but a subtle scanning for signs of mismanagement or mission drift.

Content analysis has revealed that existing donor and alumni communications at Macalester perform a significant reporting function, yet young alumni still ask for more details about how their gifts are used and how they make a difference for the college. It may be that existing reporting content is too general, not appealing to young alumni, not appropriately scaled to concrete and realistic examples, or simply not regularly read by this demographic.

### **Revisiting Hypotheses**

In response to the initial research questions, the researcher also formulated three hypotheses, restated below.

**H1:** Focus group sessions will elicit feedback about the donor-institution relationship that can be categorized according to the four stewardship strategies: reciprocity, responsibility, reporting, and relationship nurturing.

**H2:** Survey results will reveal that repeat donors judge their alma mater to perform higher on all measures associated with the four stewardship strategies when compared with inconsistent donors.

**H3:** Young alumni donors to Macalester and Grinnell will rank statements associated with reciprocity as less important than statements associated with other stewardship strategies.

After analyzing focus group results and synthesizing the findings into key themes, the researcher concluded that **H1** was supported because all major themes aligned with at least one of Kelly's (2001) four stewardship strategies. **H2** was also supported, with repeat donors ranking their college about 1 point higher on average when evaluating the performance of the school based on

various stewardship tactics. Lastly, **H3** was supported by survey results indicating that reciprocity was the least valued stewardship category out of the four tested.

### **Kelly's Model: Are The Four Stewardship Strategies Distinct Enough?**

This research has been a case study in the application of Kelly's (2001) four stewardship strategies and Waters' (2010) subsequent measurement methods. This is the first time these ideas have been applied to the higher education context. While this study has shown that the four-part stewardship strategy model provides a beneficial framework from which to explore the different ways that practitioners might engage donors, this research has also revealed some weaknesses of the model.

Perhaps the biggest issue with the four stewardship strategy model is that it can be hard to sort a tactic or message into just one category. The results of this study suggest that the strategies are not exclusive, and multiple strategies are often present in different communications and outreach efforts. As such, it can be difficult to determine which strategies are being deployed in a particular message. Even the definitions of the different strategies seem to leave room for interpretation. The researcher first encountered difficulty distinguishing between some of the stewardship strategies when designing questions for the survey. The category of responsibility was particularly tricky, because some displays of responsibility could also be interpreted as reporting. For example, if an alumni news article discusses how the college invests in sustainability initiatives on campus, does that qualify as reporting or responsibility? It demonstrates how gifts are being used, but also presents compelling evidence that the college uses donor money for a purpose that a large majority of donors consider very important.



Furthermore, the relationship nurturing category is intentionally broad, but that also makes it difficult to interpret. At times, it seemed like a catch-all, and at other times the researcher felt that the only true way to use the relationship nurturing strategy was through personal visits and conversations. This may explain why relationship nurturing was so infrequently identified in the content analysis of print materials. The translation of relationship nurturing to the academic context posed some unique challenges. Unlike the hospital donor group that Waters (2010) studied, alumni donors already have ways of engaging with their institutions that are not tied to giving. Essentially, alumni status is itself a kind of membership to the institution. Relationship nurturing is then an activity that occurs through many alumni-centric activities, even though those efforts are not restricted to donors or even driven by staff with fundraising responsibilities. This is both a benefit and a challenge for managing the donor relationship. On the one hand, all of this wonderful relationship nurturing work is already happening, and the donor base is receiving that attention on an ongoing basis. On the other hand, alumni have difficulty knowing what benefits and contact they receive because they are donors versus what they receive because they are alumni. In turn, staff may also have a difficult time discerning which groups are truly worth the extra energy and effort that relationship nurturing requires.

## **Summary of Major Findings**

### **The Importance of a Strong Alumni Community**

However, there is no doubt that relationship nurturing helps produce a strong alumni network, which was cited as a key reason for giving in focus group and survey results. Participants frequently associated interest in giving with event attendance, volunteering,

friendships, and other kinds of informal alumni community networking. Many young alumni give out of a strong sense of pride in their institution and the people it graduates. It will be important to preserve this sentiment to develop long-term loyalty and leverage the good will alumni feel toward their peers into support of current college initiatives. Effective stewardship tactics will bolster “in-group” sentiment for young alumni and provide opportunities for connection with peers via college engagement.

### **It’s Not About Gratitude for Young Alumni**

One of the biggest findings of this research is that young alumni don’t value reciprocity strategies as much as other forms of stewardship. Focus group participants generally found thank you messages to be forgettable or awkwardly over-expressive of gratitude. In survey responses, participants ranked reciprocity strategies the lowest of all stewardship strategies. While this research did not reveal significant negative reaction to reciprocity tactics, the results suggest that colleges are best served to prioritize other means of engagement with young alumni donors.

### **The Allure of the “Student Experience”**

Focus group and survey data indicate that young alumni donors are strongly moved by direct access to authentic examples of the “student experience” at their college today. For young alumni, this often includes information about social activities and the intangible qualities of the campus environment. They want to hear about 2:00 am discussions with friends in the dorms, the merits of latest dining hall menu, and whether or not you can still get expelled for breaking into underground steam tunnels. There seems to be specific social capital in the distinctive personality of both Grinnell and Macalester students that young alumni like to recognize before engaging with their time and their wallets.

Young alumni want to be thanked by students and they enjoy talking to current students when contacted via phonathon. About a third (31%) of young alumni donors would like more contact with students and when they talk; they'd like to hear evidence that the student experience is just as good today as it was when they were taking classes. Young alumni take the quality academic environment as a given and are most interested in seeing their efforts preserve the campus culture they enjoyed themselves. Content analysis suggests that some messages from the college do strongly emphasize the student experience, but a majority of communications do not. Yet, 24% of messages analyzed in the sample used student voices, so Macalester is certainly offering strong access to the right group. Content analysis did not test for message content related to the social aspects of the college experience, but that may be a key element in what feels authentic to young alumni donors. This may be an area where relationship nurturing will be the best avenue to approach audience engagement.

### **The Imperative to Report**

Young alumni want to hear what happens with their gift, and preferably not in generic terms. Stewardship communications have a great opportunity to demonstrate the value of young alumni giving with tangible examples and descriptions of the student experience today. As in all good writing, the rule here should be "show don't tell." Young alumni have a vague understanding that giving is important and helps support the college and enough brains to know they are not personally putting someone through school with their \$50 gift. Content analysis suggests that Macalester is already prioritizing reporting as function of donor and alumni communications, but focus group and survey results suggest that current tactics are not resonating with audiences as effectively as they could. Many of the samples categorized as reporting during content analysis

only contained general references to how gifts are used and lacked the sense of scale that many participants called for in focus group and survey data.

### **Limitations and Future Research**

As stated previously, the researcher is herself an alumna of Grinnell College and an employee of Macalester College. As such, the researcher has some inherent bias toward the subject and population of study. Furthermore, the snowball sampling method for the focus group and survey drew heavily from the researcher's network of friends, injecting the possibility for researcher acceptance bias among respondents. The focus group in particular was limited by geographic bias, since all participants were residents of the Twin Cities. In turn, this may have affected the Macalester representation in focus groups because alumni who live near their alma mater have more opportunities to engage with the college. However, this is probably an essential difference in the profile and alumni populations of both schools since urban environments draw more young professionals than rural environments.

Perhaps the greatest limitation in this study is the low representation of Macalester alumni in the survey sample. This was expected due to the large number of Grinnell alumni in the researcher's personal network, however, social media efforts failed to reach as large a Macalester crowd as expected. This may be attributed, in part, to the active use of the Grinnell [Plans] social network among young alumni without a comparable communication channel for Macalester alumni. Furthermore, the researcher was unable to use some venues of communication with Macalester alumni due to her status as an employee and need to maintain independent researcher status.

Another limitation that must be acknowledged is the low rate of inter-coder reliability for content analysis. Although both coders were trained to recognize the four stewardship strategies using the researcher's definitions and supplemental definitions from Waters (2010), the two coders had significantly different interpretations of the data. This points to the lack of exclusivity identified above in the discussion. Perhaps with a greater number of coders or a greater sample size, greater reliability may be achieved. Additionally, because of the breadth of material examined via content analysis, the application of each strategy may vary depending on the channel. A more focused content analysis could help improve inter-coder reliability. For example, future research could gather gift acknowledgement messages from liberal arts colleges across the country and test for the presence of various specific phrases correlated with the four stewardship categories.

Additional research could also attempt to reach a larger sample of Macalester alumni by survey, possibly in conjunction with a young alumni event or five year reunion group. It may even be valuable to broaden the focus for future research and examine Macalester and Grinnell in context with some of their more successful peers in the fundraising arena. Carleton College is often grouped with Macalester and Grinnell as a cultural and academic peer, but generally ranks higher in national reviews and performs better on most measures of alumni affinity and fundraising success. Does Carleton employ successful stewardship strategies that differ from those explored by this study?

Future work could also take a national scope, and compare the selective liberal arts colleges of the Midwest with their peers on the coasts. No matter the scope, it may also be best to attempt a longitudinal study that follows a cohort of alumni from graduation through maturity, tracking their institutional affinity, the donor-institution relationship, and giving interest along

the way. This type of long-term research is really the best way to learn if specific stewardship tactics and strategies are correlated with repeat and increased giving.

### **Recommendations**

Based on the results of this case study, this researcher recommends four key areas for the improvement of young alumni stewardship communication strategies at Grinnell and Macalester. Each suggestion is accompanied by a potential application for Macalester, where the researcher has the ability to potentially implement some programs. For all program suggestions, ongoing evaluation of stewardship strategies should always inform decision making.

#### **1. Leverage Student Culture**

As noted earlier, young alumni crave access to current students, and they want to hear more about the social experience of campus life. When they do get to interact with students, it positively impacts their interest in giving. Given the uneven presence of a culture of philanthropy on campus, it would also be beneficial for long term fundraising to more deeply involve current students in alumni outreach. Two threads that connect current students and alumni are residential life and student activities. Students have strong affinities for different residence halls on campus, and often commit to multiple years of service at different extra-curricular activities. When students graduate, residential life and student activities can be major sources of nostalgia. Since Macalester already uses student voices to talk about academic life, it would be wise to tap existing networks of student ambassadors to help generate a set of creative messages aimed at young alumni.

#### **Potential Application: Singing Telegram**

A popular and well-established student group should be selected to create a reporting message to share with young alumni donors. For example, Macalester's Scotch Tape acapella group is beloved by the majority of students even though the group only has about 20 members every year. The college advancement team could work with Scotch Tape to record a light-hearted "singing telegram" to donors, describing how alumni giving supports student groups on campus. This performance could be performed live at reunion for alumni 5 years out and a recorded version could be redistributed to a larger young alumni audience via email and social media.

## **2. Be Careful With the Mechanics of Giving**

Young alumni are still forming their opinions about giving while they negotiate the transition from student to alumni status. Missteps like asking for way too much money or thanking someone excessively for a \$10 gift can sour the appetite for future support. It behooves annual giving programs to scale their asks appropriately for this fledgling generation and to moderate recognition programs according to gift size. A one-size-fits-all donor program doesn't work for these savvy young donors who have seen their dollars well cared for at other nonprofits. Grinnell and Macalester can powerfully appeal to alumni if they strike the right tone—and too many errors of scale can seem "tone deaf" to young alumni.

### **Potential Application: Eco-Friendly Thank Yous**

To avoid over-thanking or giving the appearance of lavish gratitude, Macalester should develop and brand an eco-friendly stewardship experience for annual giving donors that minimizes the use of print materials in solicitations and gift acknowledgements. Currently, a "go paperless" giving option is available to those who give through the sustainer program,

but it is opt-in only and not well publicized. A cursory search on the Macalester web site did not reveal any way to enroll in paperless giving. As a part of this eco-friendly initiative, Macalester should also create a yearly stewardship message to young alumni donors that promotes the eco-friendly giving option and reports on dollars saved due to the program. This message could wrap in larger institutional goals and achievements surrounding sustainability. An eco-friendly tactic like this would address some of the “tone-deaf” comments while also employing reporting and sustainability stewardship strategies.

### **3. Show Them What Their Gift Does**

Data from both the focus group and survey consistently pointed to a desire for more information about how the college uses alumni gifts and what difference the average \$50 gift can do. Existing communications are not meeting the need for concrete information or appropriate scale. Young alumni don’t need to be tricked into thinking their contribution keeps the college running, but they do need to understand how their personal contribution is a vital part of the larger operation – that means telling the story in words as well as numbers.

#### **Potential Application: Giving on a Grand Scale**

Macalester should develop a print and web resource that demonstrates the value of modest alumni annual gifts. Creative for this piece should be based around a set of infographics that convey the significance of one \$20 gift in concrete terms related to both the academic and cultural experience of the institution (ex: two hours of paid internship experience through Career Development Center, twenty new student ID cards for the class of 2018). The infographics would also put a \$20 gift in context with the aggregate giving from a whole class year and then the whole alumni body for the past year. This kind of scale would



demonstrate the collective power of giving and encourage young alumni to view their individual actions as part of a larger community effort. After all, participation rate metrics are all about individual support on a community scale.

#### **4. Practice and Preach Responsibility**

Responsibility is the most valued stewardship category, and the good news is that young alumni generally trust their colleges. To maintain this trust, it will be important to continue commitments to transparency and to vocally promote the social responsibility of institutional decision making. Authority figures like the college president can be helpful in spreading these messages. Grinnell and Macalester may also want to devote more space in their alumni magazines to cover college financial reporting. Beyond one-way communication channels, it may be wise to invite more engaged alumni to be involved in college governance.

##### **Potential Application: Faculty Reports on Semi-Restricted Giving**

Macalester recently debuted a pilot annual giving initiative in which donors could select specific categories of everyday operations that they wished to support (ex: the arts, the library, financial aid) in a new web interface modeled after popular crowd-funding websites. These gifts were semi-restricted in that they were treated as general contributions to the annual fund, but earmarked for specific uses. Five different thank you letters were written from students, depending on the area to which the donor directed the gift. If Macalester continues testing this program, this research suggests that young alumni donors would appreciate receiving more detailed information about the impact of their gift within the designated subject area. A “six months later” report could be developed in the voice of a faculty member for each semi-restricted gift area and should include information on how the

department has used the new funds. This kind of brief would reaffirm that donor gifts are being used as designated. Coming from a professor, it would also straddle the line between invoking institutional authority and conveying an authentic community voice.

### **Broader Implications for the Field**

These applications and suggestions above may be useful for other selective liberal arts colleges, but should be considered with caution since they may depend on other variables outside of the scope of this research. This research does suggest, in broad terms, that relationship management models from public relations theory can be effectively applied to fundraising work in higher education. Any advancement program should be able to analyze their donor outreach using Kelly's (2001) four stewardship strategies and glean some insight about the way they are prioritizing their relationship management efforts. Other PR models may prove useful as well, but Kelly's stewardship focus helps provide a needed perspective for an advancement specialization that doesn't often get studied. It is also increasingly imperative that fundraising and alumni relations professionals begin to understand the motivations and behaviors of the ascending Millennial generation. Old models of advancement may not work as well for this new generation of supporters, and this research lays some groundwork for identifying the most important ways to keep young alumni donors engaged. The relationship building work that advancement professionals do with young alumni in the coming 5-10 years will likely set the stage for the long-term giving potential of this generation.

## Tables

**Table 1**

Survey Responses Evaluating the Importance of Responsibility Strategies

	Strongly Disagree							Strongly Agree		
Responsibility Statements	1	2	3	4	5	6	7	8	9	Mean
Keeps its promises about how it will use alumni gifts	0%	0%	0%	1%	3%	4%	14%	21%	58%	8.25
Acts in a socially responsible manner when using alumni gifts	1%	0%	0%	0%	2%	3%	16%	24%	54%	8.2
Considers my opinions when planning how to use my gift	2%	0%	2%	4%	7%	20%	25%	19%	20%	6.89
My gift is used for the purpose I intended	1%	2%	0%	1%	7%	10%	20%	17%	43%	7.6

**Table 2**

Survey Responses Evaluating the Importance of Reciprocity Strategies

	Strongly Disagree								Strongly Agree	
Reciprocity Statements	1	2	3	4	5	6	7	8	9	Mean
Thanks me for giving with small perks like a keychain or card at the holidays	26%	13 %	10 %	10 %	14%	15 %	6%	3%	3%	3.75
Considers me a friend	6%	7%	6%	8%	22%	21 %	13 %	9%	7%	5.35
Acknowledges my gift in a timely manner	6%	4%	6%	9%	21%	20 %	16 %	9%	11%	5.66
My name is included in an "honor roll" of donors during years when I give	23%	14 %	10 %	4%	17%	12 %	9%	2%	7%	4.07

**Table 3**

Frequency of Strategy Interaction as Identified by Coders

*Out of 234 secondary/primary pairs generated with 116 samples. Primary strategy selections are presented on the vertical axis, secondary are presented on the horizontal axis.*

	<b>Reporting</b>	<b>Reciprocity</b>	<b>Responsibility</b>	<b>Relationship Nurturing</b>
<b>Reporting</b>	X	15	25	29
<b>Reciprocity</b>	18	X	1	8
<b>Responsibility</b>	19	6	X	12
<b>Relationship Nurturing</b>	8	2	1	X

**Table 4**

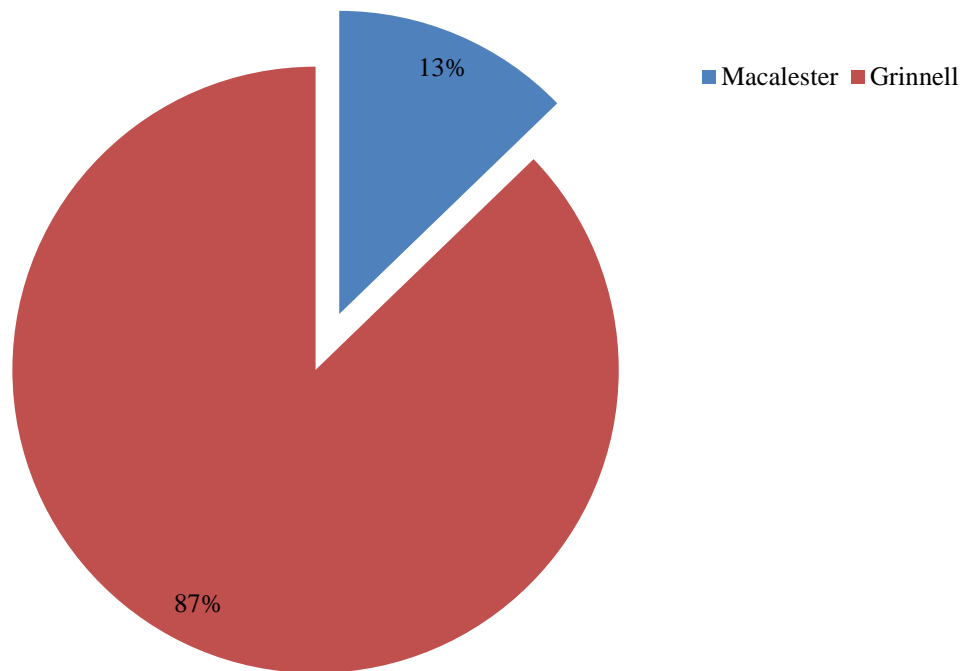
Frequency of Strategy Interaction as Identified by Coders—Regardless of Primary/Secondary Status

*Out of 234 secondary/primary pairs generated with 116 samples*

<b>Strategy Pairs</b>	<b>Frequency</b>
Reporting + Reciprocity	33
Reporting + Responsibility	44
Reporting + Relationship Nurturing	37
Reciprocity + Responsibility	7
Reciprocity + Relationship Nurturing	10
Responsibility + Relationship Nurturing	13

## Figures

**Figure 1**  
Proportion of Survey Respondents

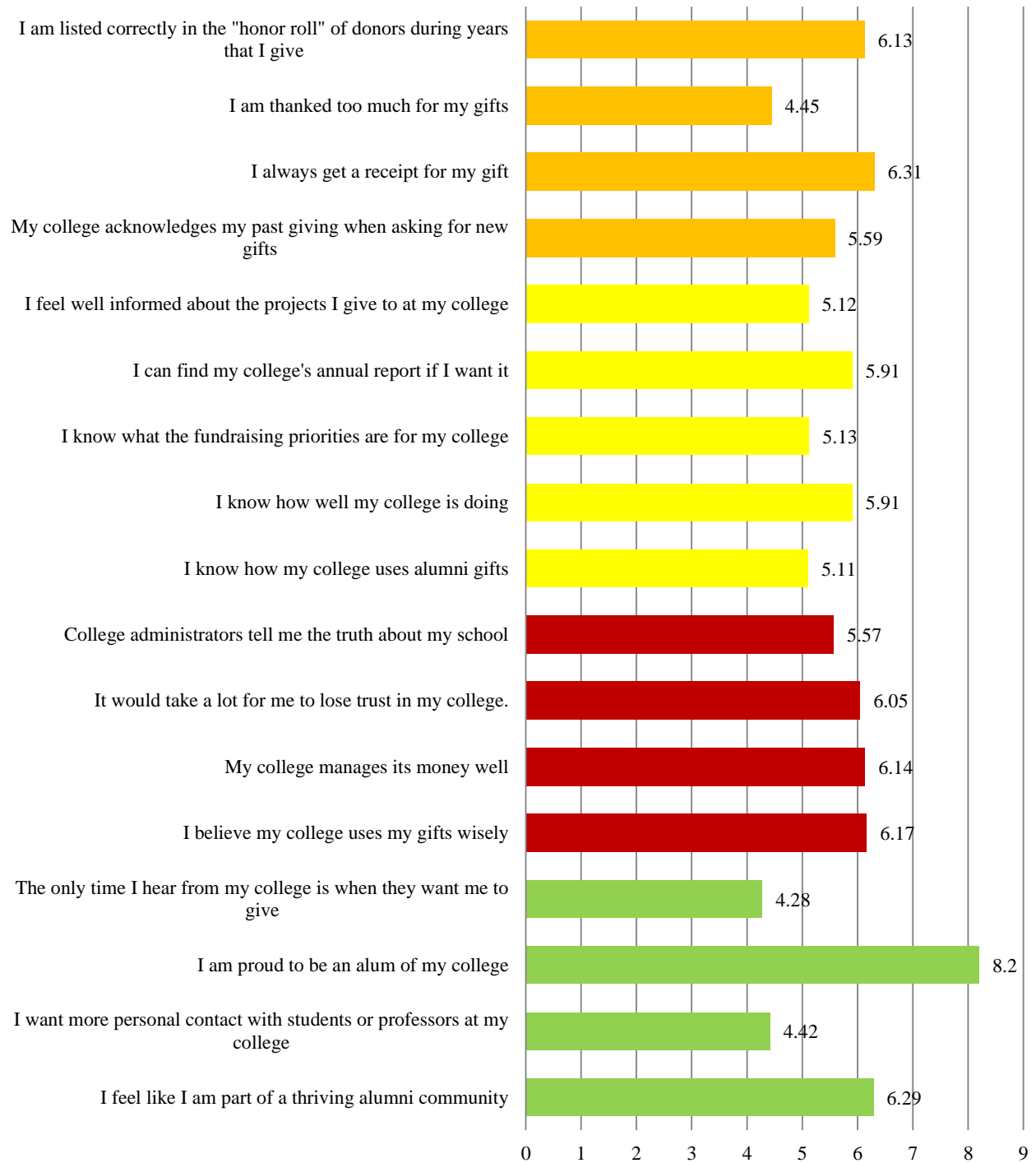


**Figure 2**

Mean Donor Evaluations of Stewardship Tactics on Likert Scale

■ Reciprocity     
 ■ Reporting     
 ■ Responsibility     
 ■ Relationship Nurturing

## Mean Donor Evaluations of Stewardship Tactics

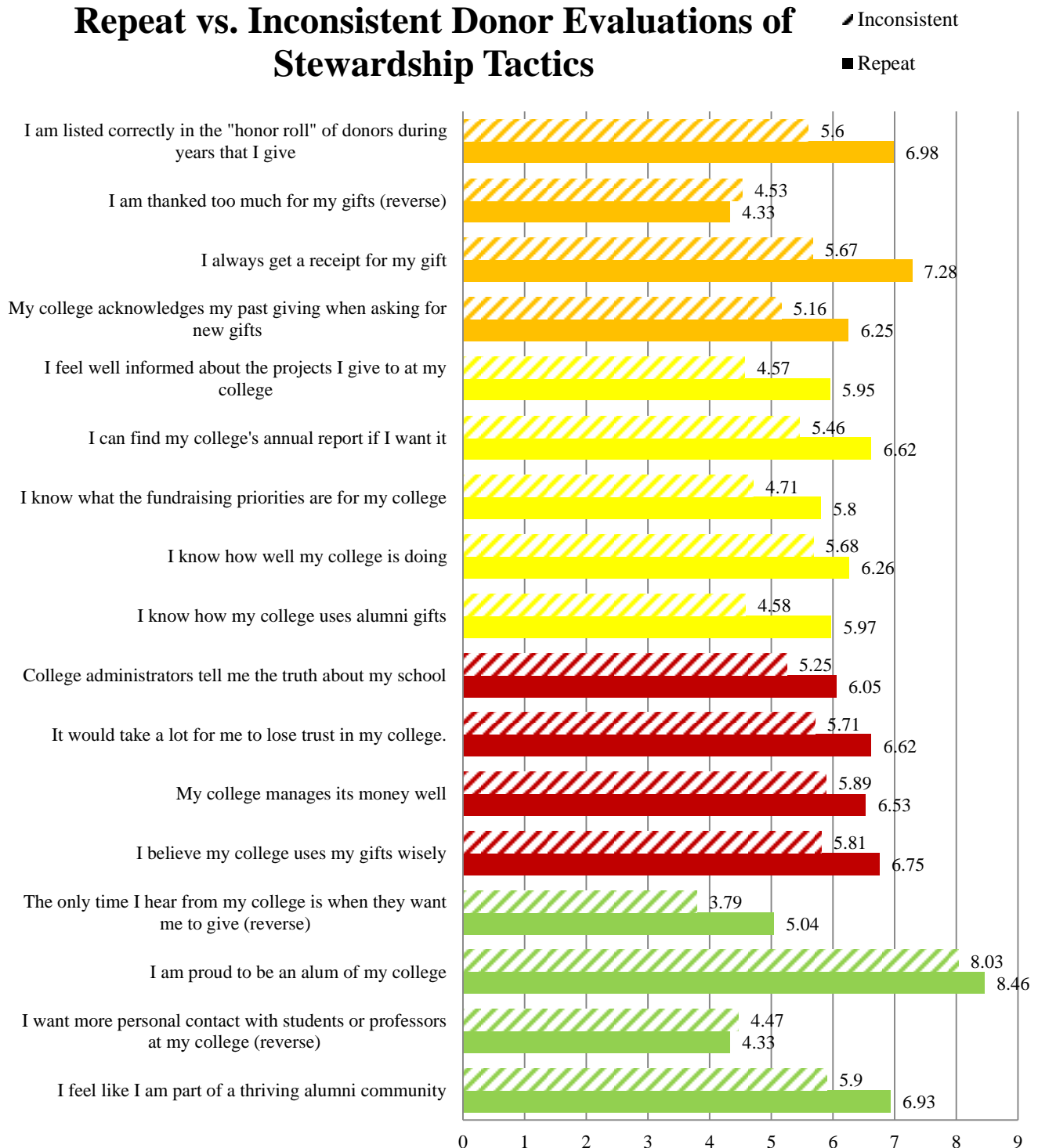


**Figure 3**

Mean Donor Evaluation of Stewardship Tactics on Likert Scale - *Repeat Donors vs. Inconsistent Donors*

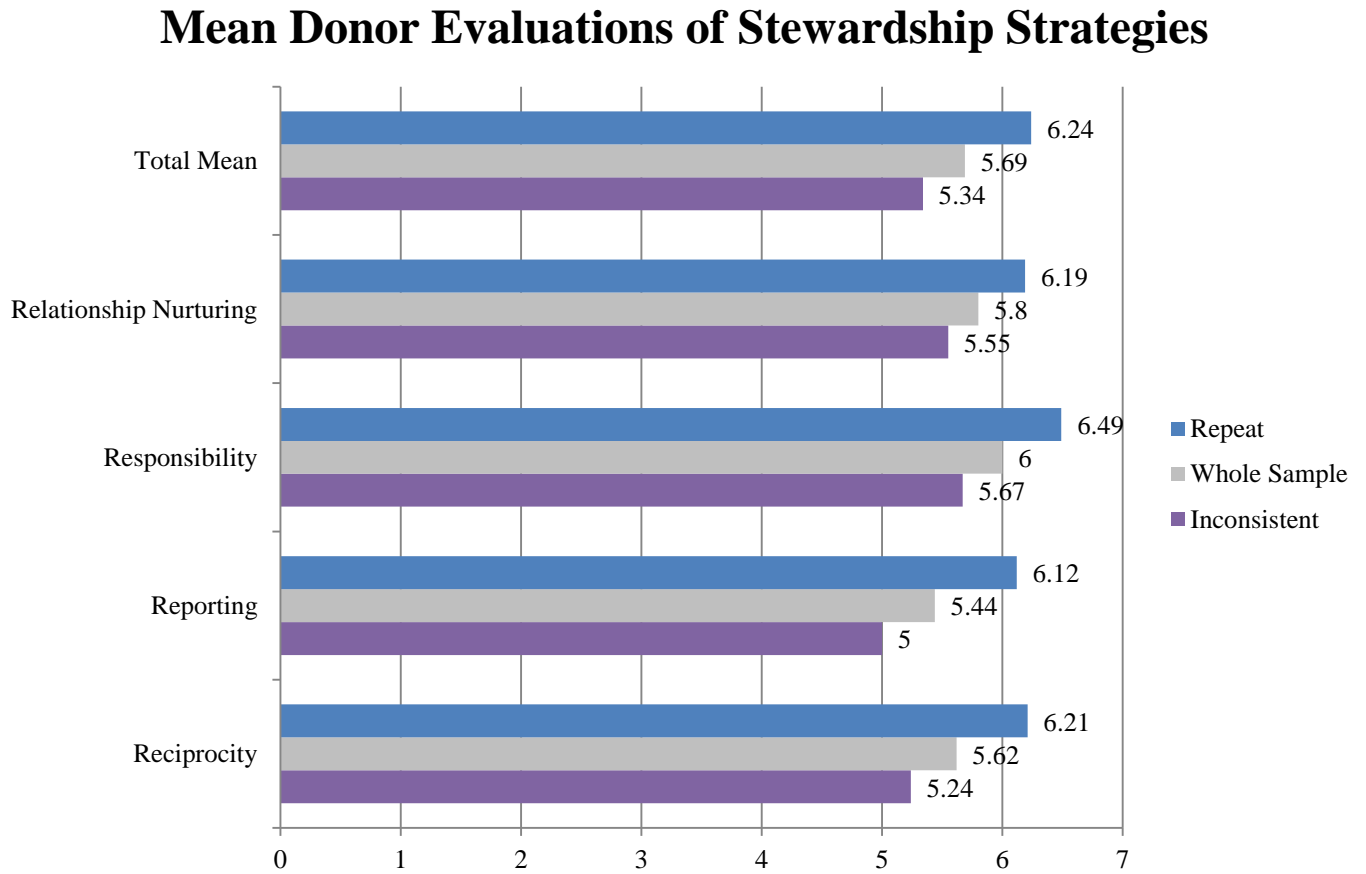
■ Reciprocity     
 ■ Reporting     
 ■ Responsibility     
 ■ Relationship Nurturing

### Repeat vs. Inconsistent Donor Evaluations of Stewardship Tactics



**Figure 4**

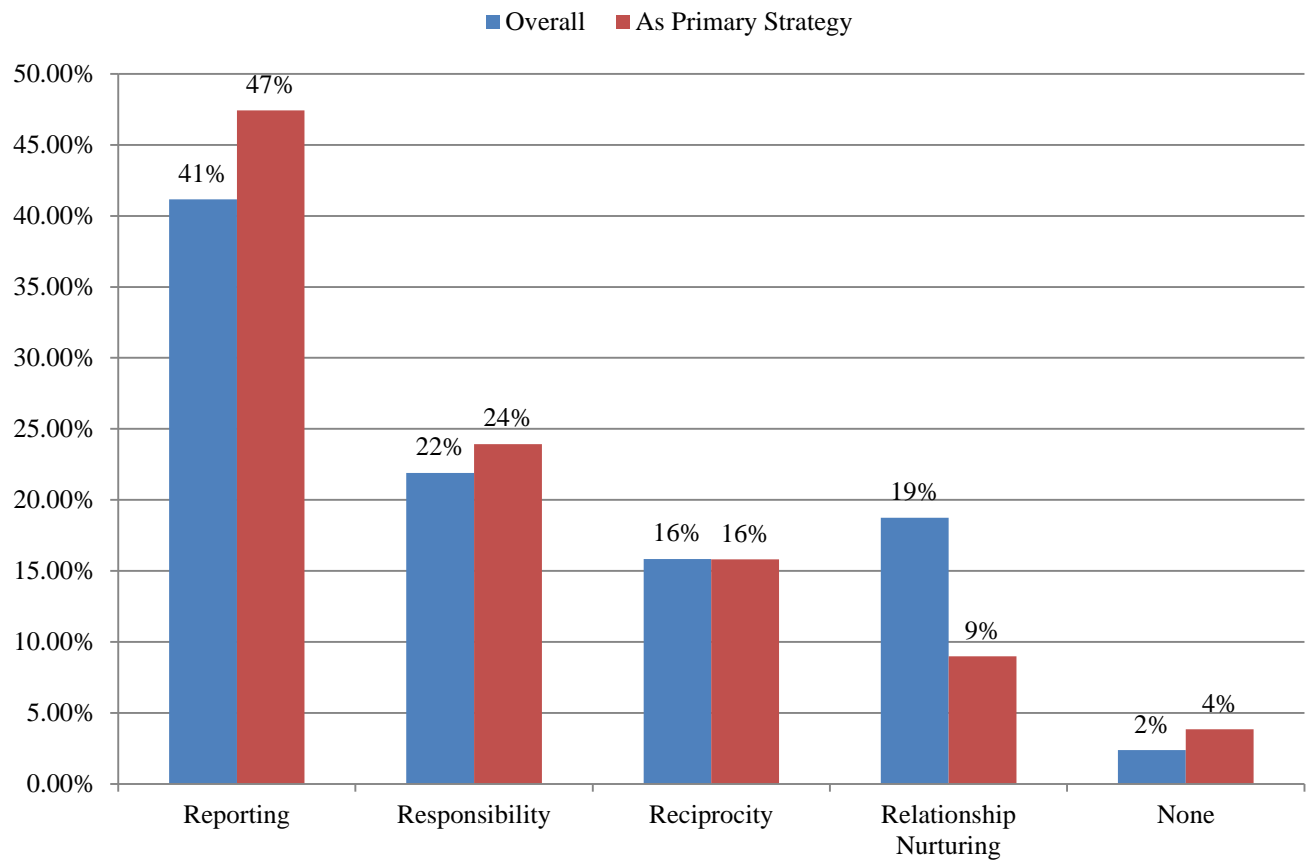
Mean Donor Evaluations of Four Stewardship Strategies and Overall Mean Evaluations  
*Presented as a Comparison of Repeat Donors, Inconsistent Donors, and the Whole Sample*





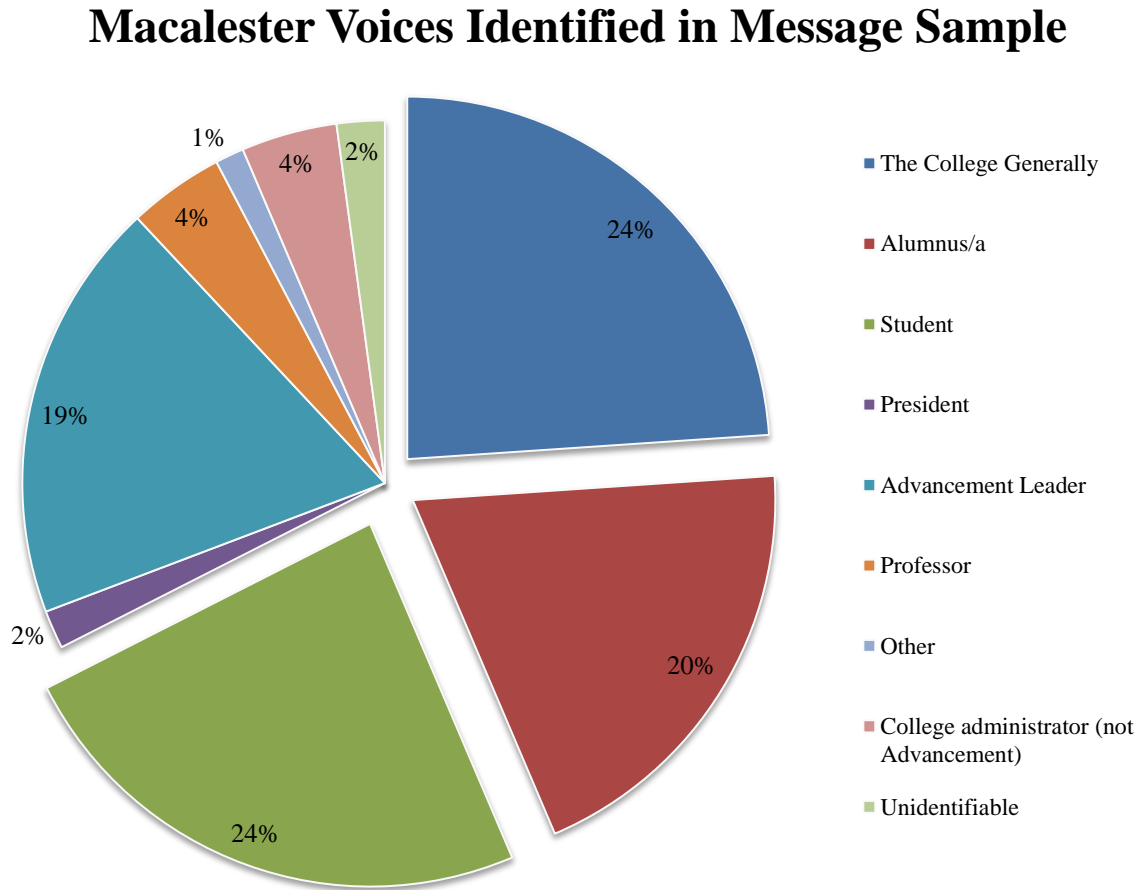
**Figure 5**

Proportion of Sample Messages Judged to Contain Each Stewardship Strategy



**Figure 6**

Proportion of Sample Messages Identified with Various Macalester Voices



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**Appendix A**  
Sample Focus Group Recruitment Message

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Amanda Underwood <amunderwoo1@gmail.com>

**Focus group next Sunday**

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**Amanda Underwood** <amunderwoo1@gmail.com>

Sun, Apr 13, 2014 at 9:54 PM

To: [REDACTED]

It's on. I'm holding a focus group next Sunday at 2pm at our place [REDACTED] Ave S). Can I plan on you joining us?

Also if you know any Mac alums I'm looking for more of their kind. Need to have given to Mac at some point and be roughly 22 - 32 years old.

Here's the spiel if you have anyone to forward to:

*I'm recruiting volunteers for a focus group at my house next weekend for my grad school research. I'm looking for young Grinnell & Macalester grads who have donated to their college at least once in their lives. Does that sound like you or someone you know?*

*I'm holding two focus groups, one at 2pm on Saturday, April 19 and one at 2pm on Sunday, April 20. Each focus group session will last about an hour. Pizza and beverages will be provided. I'll be asking some general questions about giving behaviors and motivations. The purpose of my research is to explore long-term relationship management strategies for young alumni of private liberal arts colleges.*

*Your responses would be confidential and -- let me stress -- this is not funded by Macalester or part of my job. It's for my MA thesis. I might share the results with Mac, but only in a general way and you would not be identified at all.*

*What do you think? Are you interested?*

Thanks!!

Amanda

**Appendix B**  
Focus Group Transcripts

Session One

Saturday, April 19<sup>th</sup> 2:00 – 3:00 PM

**Moderator Intro:** This is for my MA capstone project exploring relationship management practices for young alumni donors to private liberal arts colleges. I am doing a case study on Macalester and Grinnell. As some of you already know, I also work at Macalester, so I chose this topic because it is of professional interest, but this research is not affiliated with Macalester or Grinnell and your participation is confidential.

Present: Six Participants, three male, three female. Two Macalester alumni, four Grinnell alumni.

**1. Let's introduce ourselves as we go around. Please tell us whether you're from Grinnell or Macalester, what year you graduated, and how connected you feel to your college today.**

**Participant 1:** I don't feel too connected to people there, but I have fond memories and I have friends around here. Married a Grinnell grad.

**Participant 2:** I graduated in 2009 from Macalester – super connected

**Participant 3:** I graduated in 2005 from Grinnell – not very connected up until the past year or so because I friend of mine is now a professor at Grinnell. Renewing those connections and getting involved again

**Participant 4:** I'm 2009 and I feel connected to specific professors at Grinnell but not otherwise

**Participant 5:** I'm a 2008 grad– not that connected with professors but I feel way more engaged in the alumni community. I've been going to alumni events and realizing the breadth of people still out there. So, I've re-engaged in the past few years.

**Participant 6:** I graduated in 2009 from Mac. I've felt more connected as time has gone on. I wasn't on campus as much as most people but I've done a lot of events.

**2. Consider the very first time you gave to the college. Why did you give?**

**P3:** I gave at graduation. I gave a dollar so they had stats on grads who gave money.

**P5:** I gave a buck as a senior so they would stop bugging me

**P4:** I gave \$10ish

**P6:** There was a strong culture of giving back in Econ. We had alums come back and talk about alumni lives and giving back. That experience added for me. When I was asked recently about giving money on the phone, she asked me what advice I'd give to a freshman and that really got me.

**P2:** I was on senior class gift committee.

**P1:** I don't remember; it was probably the first time and I got something in the mail. I gave what

I could afford at the time.

**P4:** I don't think I've ever donated by mail. I always just wait for the call. I did the phonathon my first year and I liked calling the alums cause they shared stories about campus.

**P6:** Yeah, I know they'll call, so I just wait for them to come to me.

**P4:** I really wish they'd stop sending so much mail – it's expensive and wasteful

**3. In the years since that first donation, you have all either given again, or not. How did you decide whether to keep giving to the college?**

**P2:** I'm a sustainer (for Mac) so I don't get any calls anymore except a thank you, which is nice. I like that. I don't get much mail, throw it away.

**P6:** I do the sustaining thing too

**P5:** Does Grinnell do sustaining? I want to do that too. I was waiting to make "real money" before I started giving, and I did that with MPR but not so much anymore. I've just been increasing by \$10 every year. It just seems like the right amount.

**P6:** I'm conflicted about giving sometimes, but we had a strong culture of giving back so I try to support. I got a scholarship and want to support them [students today].

**P3:** I was not a fan of donating for a long time because they called me in July after I first graduated and asked for \$781 when I didn't have a job. So, I was pissed. Don't START with that number. I was so offended, so I didn't answer the phone when they called. I didn't look at my mail. I know they have a huge endowment and I didn't think my \$20 would make a difference. I'd rather do something that's tangible for me. Once I got a good job, I gave again. I still don't like giving money as much as doing other volunteer things. I like to do more than give money.

**4. Consider the last time you gave to the college. The following questions will be about that one gift in particular.**

**a. Did you give to the general fund or to something specific?**

**P5:** I give generally, I trust Grinnell to do what they need to do with it. I think I would give specifically to that pool if I knew they would use it specifically. To the U of M I give only to my college.

**P2:** I try to give a bit to the senior class gift too.

**b. Were you thanked? Did you feel the college expressed gratitude? Why or why not?**

**P6:** By proxy, yes. Yes, I was thanked.

**P3:** I was thanked but it wasn't as much as when we hosted the extern. We got 3 thank yous for that. It was more personal.

**P4:** I haven't given since graduation, but I went to Grinnell to talk to computer science students and we didn't have them pay for the hotel. We didn't want to cost them money while you we were there. We felt appreciated while we were there. They took us out to dinner. Currently, I don't give because I don't trust it's going to a good place. If I was going to give again, I would give to a specific thing. I don't trust

higher ed. to manage things well. I want it to know it's going to the educational experience

**P6:** Now that we have to be competitive and charge a certain amount and attract a specific group of students... we have to build new buildings and upgrade. It's driven by the market right now. It's not a bad choice, but I'd rather know [my gift is] directly benefitting the students. I mean, it is benefiting the students, but, like, the new music building mostly benefits music students.

**P2:** Yeah, I mean the new gym benefits the music students. That's how I felt about the gym, it benefits like 60% of students.

**P4:** I did get thanked, but I didn't really notice. I just don't want a thank you card. I don't really care if they thank me at all. I don't want too much more than that. I expect that once a year call and that's fine, but beyond that it's frivolous. I might like something creative.

**P6:** An email would be good.

**P4:** Agree

*c. Do you feel that your gift was used responsibly by the college? Why or why not?*

**P4 & P1** give regularly, but don't think about it

**P3, P6, P2:** I do trust, yeah.

*d. Do you know your gift was used for? / What do you think it was used for?*

*e. Do you feel like your college made any extra effort to connect with you because you gave money?*

**P4:** I'd be less likely to give if I knew they'd harass me more. Otherwise, no

*f. What would the college need to do for you to consider giving again in the future?*

**P3:** I haven't verbalized this before, but I would love to be able to direct my donation to a specific department or project, or get some sort of information about a concrete thing I'm supporting. \$50 does what for the college? I don't really know what my money does. I want to hear what the impact is. Hearing back what that impact is makes it more likely that I would increase that a bit.

**P5:** Yeah, when they had asked you for \$700, if they had told you that it buys an alt break trip for one student, would you have been more likely to give or at least think about it?

**P3:** Yeah, I would be more likely to give if I knew. It would help to have some connection, knowing you're having a direct effect on someone's education. Knowing you're making a difference.

**P4:** Yeah, if it was more like Kickstarter we could choose what to fund.

**P6:** Yeah, but I'm worried about people donating to too many specific things.

**P5:** Or what if we could fund student initiatives? I'd love to know what they are.



- g. Is there anything else you would like to tell me about how your gift was handled or how you were treated as a donor?*

**P4:** I feel like I'm not just engaged when I'm giving money, I get that call once a year, but I'm also part of the community otherwise. They're totally giving me something every time I give to an alumni event, so...

**These next questions are more general, and do not apply to a specific instance of giving.**

**5. How would you characterize communications about giving from your college?**

**P4:** Too much paper, too many mailings

**P6:** Phone calls are increasingly positive, but form letters still sound generic.

**P4:** It would be great if they were smart enough not to send duplicate mailings to alumni living at the same address.

- a. Where would you say they fall between being personal and impersonal?*

**P5:** Phonathon is always personal. They coach the students well. I feel like I have something in common with even current students.

**P2:** I'm on the reunion committee and we've been trying to send communications with in-jokes.

**P6:** We've had a lot of stuff coming from the college that enhances goodwill about the alumni community; they're still doing cool things. I want to support that.

**6. Do you think the thank you process could be improved? In what way?**

**P5:** I don't care. I don't want anything big.

**P4:** I donate to environment Minnesota as a sustainer but I don't care about getting stuff from them.

**P6:** it might be a generational thing. I think how my grandparents complain if I don't send a thank you for getting a gift.

**P2:** I checked a box to say I want to be a "green giver" so I don't want to get more mailings than absolutely necessary.

**P3:** I don't care about gift thank yous, but I did care about getting a thank you from the extern thing. We're not sustainers but we give over the phone or by mail.

- a. In what ways do you want to be recognized as a donor?*

**P5:** Don't they put it in the magazine?

**P4:** And they put it in an honor roll publication.

**EVERYONE:** That's so expensive!

**P2:** I like the donor honor roll online. You can see that one girl from our year gives like 4k. Wow!

**→Do you feel any peer pressure to give? Does it make you want to give when you know your classmates give?**

**P6:** One year I didn't give and all of my friends were on the honor roll so I felt bad.

**P5:** I think it normalizes it, because there's a huge endowment and so there's almost some peer pressure not to give. Seeing how many other people give reinforces that it's okay and normal and important for me to give. It's OKAY to give because other give too.

**7. How do you anticipate your relationship with your college changing as you become more professionally established or enter your next phase of life? As a donor?**

**P1:** I'll probably give a little more when I start making some money

**P6:** Same

**P4:** Yeah, I think over time I will eventually give money to Grinnell. I don't know what will be that tipping point. It's not that I'm committed to not giving.

**P5:** Increasing by \$10 every year feels really naturally. It feels adulty, I'm okay with it. But I set that myself.

**P2:** It's cool that you just decide to do it on your own. Mac encourages young alums to increase quickly, but it's too much...it's tone deaf.

**P5:** There's nothing that turns you off more than them citing a number that you don't feel comfortable with.

**P3:** Now that I'm established enough in my career that I feel like I have advice, I'm much more connected back to the department and the people there. I try to make myself available to students that might have questions. As a donor, I just feel like I'm a line in a spreadsheet. There's nothing super unique about my donations about Grinnell.

**→If someone approached you about investing in (giving significantly) to an area you've been giving your time to, would you do it?**

**P3:** Yes, absolutely, if they approached me personally about giving to a specific area. If the gratitude was genuine, if they got to enjoy collecting bugs as much as I do.

**P4:** Yes, targeted opportunities would be great. If I can be convinced that it's going to a good place, I will feel better.

**P3:** I'm also a little cautious about this, because I don't want funding just to be restricted to the things alumni care about. Some groups could fall away if you don't have alumni directing money your way.

**P4:** Yeah, that's why I mentioned initiatives because I want to hear what students need and what ideas students have. I want to support them.

**8. Do you feel informed about recent achievements and current issues facing your college?**

**P4:** yes, relatively. I rarely hear about things directly from Grinnell, but I hear more from the alumni network. I heard about that marketing study via [plans].

**P6:** I feel well informed.

**P5:** I get a monthly email with “Grinnell in the news”

**P2:** Yeah I get a monthly email, I follow Facebook and twitter and the magazine

**P4:** I like the magazine...but wish it was an e-book

**P4:** Yeah, magazine

**P6:** Yeah, I probably

**P3:** Yeah, I read the magazine but I don’t keep it around

**P4:** I use it as a coffee table decoration

**P1:** I’m about as informed as I choose to be about these things. I’ll look at it if I want to.

**P6:** I feel like there will be a point when we all look at the obituaries too

**P5:** I kind of feel like Grinnell is really shitty at social media. It never occurred o me to follow them. I would look at some funny videos or something.

**P6:** Do you have a young alumni group?

**P4:** We have [plans] and ECN... though I heard [plans] not getting used by current students or really new alums

### **Lastly, a few big picture questions**

**9. Not all alumni give. How do you want to be treated differently as someone who has given?**

**10. How does giving to your college factor into your overall charitable giving?**

**P2:** I give to MPR and Mac as a sustainer. I just donate to things I care about them, so it’s really just MPR and politics.

**P6:** It’s hard cause there are so many things that you could donate to, so I do sustaining for things I really care about, like Mac, but other things are just one off.

**P4:** Yeah, I would do sustaining if I could. I’d try to up MPR and Grinnell at the same time. If I heard “a lot of your class is increasing xx%” I would be more interested. I don’t want to haggle over the price of a donation, I don’t want it to feel transactional.

**P6:** \$10 a month is about what I spend on Netflix, so I feel like I should give the same amount to Education.

**P4:** I mainly give to environment Minnesota.

**11. What causes you to give repeated donations to any organization (whether that’s every year, every pledge drive, or monthly)?**

Everyone: solicitation phone calls are what prompt most of my giving

**P4:** It might go back farther, when I think about how my parents give. It feels equally casual and equally important as I saw my parents doing it. They had an annual sense of it.

**P6:** A lot of it comes down to the experience that I had and the experience that I continue to have as an alum.

**P3:** I am much more likely to donate to causes that I really believe in. When it feels like they just

want their annual giving participation rate to look good, I don't feel like it's as important as some of the other donations I might give to humane society, nature center, etc. Seems like such a small drop in a really huge bucket... I support the school, but my donation doesn't seem to be as important as them continuing to operate as a college.

**P4:** Yeah, I feel similarly. It feels like Grinnell is trying really hard to be more respected as a liberal arts school and I don't think most of the alumni really care about that a ton... they want to know it's a quality school, but I don't care if they are top 10. On top of my other issues of not giving, I don't want to give them money just to be ranked higher.

**P4:** It feels like it's been a process while I was there. I've seen reference to a strategic plan. As a student it was all this high level strategic perspective. But now as an alum I feel like this competition to be top 10 misses a lot of what people wanted to get a lot out of Grinnell.

**P6:** Yeah, I experienced that too. It came directly out of institutional strategy at the time I was there. Some people care a lot more than others... we hear about the rankings and care, but I care more about the experience as it was there and as it was now.

**P2 –** Yeah, I think people care, but they want to be thought of in the same breath of Bowdoin, Middlebury... it's more about the group we're classified with than the number ranking itself.

**P4 –** It needs to be ranked ENOUGH that people have heard of it in job interviews and stuff.

### **Other comments?**

**P3:** with other organizations, I'm much more likely to give time than money. Last weekend I spent a while in a warehouse organizing yarns and fabric scraps for the textile rummage sale. We sort it and people come and buy it. I'm much more likely to say: sure, I can give a few hours to a lot of different organizations, where I'm not quite ready to say sure, I'll give you some money. Not as many opportunities to do that with Grinnell. We did like that with the externship because we felt it was really valuable.

**P5:** I like the option to give time OR money. When I give time, that always makes me feel much better. I'm probably more likely to give when I give my time too. Even stuff like students emailing... I love doing that. And that probably will more likely to give money too. I just don't want to be transactional where people only ask me for money. I love talking to students and answering their questions.

**THANK YOU!**

SESSION TWO

Sunday, April 20<sup>th</sup> 2:00 – 3:00 PM

**Moderator Intro:** This is for my MA capstone project exploring relationship management practices for young alumni donors to private liberal arts colleges. I am doing a case study on Macalester and Grinnell. As some of you already know, I also work at Macalester, so I chose this topic because it is of professional interest, but this research is not affiliated with Macalester or Grinnell and your participation is confidential.

Present: Five participants, two male, three female. Two Macalester alumni, three Grinnell alumni.

**12. Let's introduce ourselves as we go around. Please tell us whether you're from Grinnell or Macalester, what year you graduated, and how connected you feel to your college today.**

**Participant 7:** I'm '08, and I feel pretty connected to Grinnell. A lot of my friends are Grinnellians, so I feel pretty connected through them. This year is reunion for me, so I'm reminded regularly.

**Participant 8:** I'm a 2009 Mac grad. I feel really connected to the college. It's right here. I live farther away, but I have friends who live near campus so I'm there fairly frequently. My wife and friends are from Macalester. It's still a part of my life very much.

**Participant 9:** I'm a 2010 grad, and still pretty feel connected to the college. Close location, played softball and go back to see sports events there.

**Participant 10:** I'm Grinnell class of 2008, I feel pretty connected but haven't been back in a while and most of my friends aren't Grinnell related.

**Participant 11:** I graduated in 2009, and feel pretty connected. Most of my friends are Grinnell alums. I feel proud to have gone there.

**13. Consider the very first time you gave to the college. Why did you give?**

**P7:** I think it was phonathon calling me and I gave because they asked me to. I planned on giving, knew they would call, knew I would give.

**P11:** I worked for phonathon for 2 weeks, and I really hated working there but I learned alumni engagement via giving impacts school rankings. I was motivated to give based on that. That's probably why I gave. I gave when I was a senior during senior challenge. Minimal amount, but some.

**P7:** Yeah, I think I did that too.

**P9:** Yeah, me too.

**P8:** Yeah, me too. I continue to give nominal amounts since then because I support the college. I gave 5 or 10 bucks every year since then just to be a statistic.

**P8:** I think it's because it was the first time they asked, it seemed like the right thing to do at the

time. I was feeling nostalgic and wanted to give at the time.

**P9:** It was my first chance to give back.

**P10:** I did not give at any senior events...I felt whatever I could give wouldn't be useful at that time. I didn't have a job, so I didn't feel compelled. My first time giving was from phonathon.

**P7:** I think if anything there's pressure NOT to give at Grinnell, so I probably resisted it a bit that way.

**→Can you pinpoint why you gave on the phone?**

**P10:** I really enjoyed my phonathon call. I like talking to the students. They asked me for sage advice. We talked for almost half an hour and after that conversation they asked me to give and I thought, yes, I could spare a few dollars, so yes.

**P11:** The times I've given through phonathon are almost out of sympathy for the student because I hated doing it. When I've spoken to them about what they're doing with the money, it's not that exciting. I like talking to the person on the phone, but when you get down to the nitty gritty it's disappointing.

**14. In the years since that first donation, you have all either given again, or not. How did you decide whether to keep giving to the college?**

**P8:** It's easy when it's \$5 a year.

**P11:** My partner works in higher ed., so I feel like it's an important thing to invest in. Voting with your dollar about the things that you value is important, I think.

**P7:** I've never seriously thought about not giving, it's just the timing.

**P10:** I've never had a reason to stop.

**P9:** I haven't given since my first year, but that's because of lack of means. But once I have a job, I'll start doing something nominal.

**15. Consider the last time you gave to the college. The following questions will be about that one gift in particular.**

**a. Did you give to the general fund or to something specific?**

**Most:** general fund

**P11:** I think we gave to need-based scholarships b/c there's been some conversation about need-based aid and need-blind institutional priorities. Putting our money where our mouth is.

**b. Were you thanked? Did you feel the college expressed gratitude? Why or why not?**

**P7:** I'm always thanked like 11 times and I'm always uncomfortable with it because I give all the time and it's not that much money. It feels overkill.

**P8:** Yeah, I feel like I get too much thanks for my small gift. The students seem really happy when they get a gift via phonathon.

**P11:** yeah, I think we were thanked but I don't really keep those things around. Sometimes we get little gifts and I keep those around for a bit longer. Useful gifts are

nice.

**P7:** Yeah, I appreciate that stuff more. But I still don't think I give enough to justify it.

**P11:** If it were anything bigger than a little sticker I might think it was dumb, but the scale seems appropriate.

**P7:** They always do the honor roll of giving thing, too, and my parents thank me for giving.

*c. Do you feel that your gift was used responsibly by the college? Why or why not?*

**P10:** I hope so. I don't look into it, but I trust the college to use it in a useful way.

**P11:** Yeah, based on having worked at phonathon, I'm pretty aware that most of the money goes to general school functioning things like maintenance and electricity. It's not glamorous, but I don't think it's being mismanaged.

**P7:** That's why I give to general fund. If I didn't trust them to handle general money, why would I give to the general fund? I trust them to do the right thing with it where they need it.

**P8:** Yeah, I generally trust them. I know some people get up in arms about buildings but—

**P9:** Yeah, recently they've had a lot of building projects that I know I've gotten calls for. I say sorry, can't right now.

*d. Do you know your gift was used for? / What do you think it was used for?*

**P8:** There used to be an advertising campaign about what the general fund pays for. I think they do this in response to uproar about overspending on new facilities.

**P7:** I feel like I don't know. I'd like a breakdown on that.

*e. Do you feel like your college made any extra effort to connect with you because you gave money?*

**P11:** They sent me a valentine's card.

**P7:** But is that because of your money? Or just because you're an alum?

**P11:** No, I think it's because we give. Or just because we have updated addresses and told Grinnell that we're a couple.

**P7:** I don't think so, but I don't really know. We get invited to the president's events when he visits, but I think everyone gets invited.

**P9:** No, but I get lots of contact with the college because of my close location even though I'm not a donor.

**P11:** We got the little gifts because of being a donor, so I like that I guess. I know not everyone gets one.

**→ Does that give you any advantage in your peer group?**

**P11:** I don't know, there's almost pressure NOT to give. There's pressure to stick it to the man and not give, so...I do think in a way I feel good about it, but I know that my friends

who don't give don't care. Because they think they're sticking to a pride point by not Giving. Or some weird ethics thing.

*f. What would the college need to do for you to consider giving again in the future?*

**P11:** continue existing

**P7:** They'd have to do something terrible for me not to give....like be discriminatory

**P8:** Yeah, also nothing other than just a terrible decision.

**P7:** I mean, I'm worried about Grinnell losing need-blind but I think they'll have to because it's so expensive. Donations will probably go down at that time but I'll still give

**P8:** as long as you still believe in the philosophical mission of the school, you should still support it.

**P7:** I could see why people won't give, but I'd still give.

**P10:** yeah, I'm worried about that but I know there are a lot of complex economics about that [need-blind admission] decision that I don't understand, so I trust the college will do the right thing. I would still give even if they couldn't continue need blind. It might persuade me to give to an admissions pool.

*g. Is there anything else you would like to tell me about how your gift was handled or how you were treated as a donor?*

[no response]

**These next questions are more general, and do not apply to a specific instance of giving.**

**16. How would you characterize communications about giving from your college?**

**P9:** I recently got emails about the Yes, Macalester! Email.... There were graphics, support the incoming students, give to x different projects. I read it, which is unusual. The nice graphics pulled me in. Normally, the emails are boring and I just put them in a Macalester folder.

**P8:** I delete all emails from my college unless it's something really important. I only think about giving when I get a phone call and get that personal contact.

**→What if you got another phone call a year? For a second gift?**

**P8:** I'd consider giving a few times for a special purpose, but not at this point. My extra money is a nominal donation anyway. It's not going to realistically help them.

**P10:** I get letters and emails and I usually ignore them. I only get one phone call a year and I respond to it. It allows me to keep track of things. If I donated every time they sent me something, it would be difficult to keep track of. If they called me twice a year, I might be tricked into giving again, but I would try to just give one lump sum a year.

**P7:** If they called me again, I'd think they messed up. Like, they'd tricked me. If they did it frequently, like twice a year, I'd be pissed.

**→Why would you feel tricked?**



**P7:** Because I think they'd want to me to give twice as much.

→ **What if it was for a specific purpose?**

**P7:** Yeah, I guess I would consider it again for a specific thing.

**P11:** Yeah, me too. I wouldn't want to give more than once to the pioneer fund.

*a. Where would you say they fall between being personal and impersonal?*

**P10:** the letters always appeal to my sense of duty. The phone call asks a general question from a list and we have a pleasant conversation for 5 minutes... it has a stilted feeling, but I know they are being genuine in the conversation. I can tell a scripted question from a non-scripted question.

**P11:** I feel like, for me, we get letters that are like "this person was able to go to Grinnell or do this internship because of your gift". For me, the scale is off on those. Like, nope, this person was not able to go on an internship because of my gift. That is NOT the scale of my gift. So it feels sort of disingenuous. Yes, it's a great thing, and I don't know that that's what my money actually goes toward.

**P7:** And that's not why I give either, when the students call, I give because I want us to have a shared experience.

→ **What kind of experiences?**

**P7:** Like Harris parties, like stealing toilet paper, like random stuff that I really valued as a student.

**P8:** I think that's spot on... it's about the sentiment that we attach to the college. Which is why we like the phone call. Communications... I've really appreciated funny youtube videos or things with our president being silly. Inside jokes about the college are great. Prominent alumni from the class writing emails and keeping in touch about things that are particular to your class work to draw my attention really well... rather than a generic look at what some students are doing.

**P11:** A lot of the communications that are giving-related are definitely aimed at people who are 15+ years older who have lots of money. That's the kind of people this stuff is for, I think.

**P8:** Yeah, but as far as creating a culture of giving every year... keying in to sentiment is more effective for me. If I'm one day in that donor class I'll be more willing to give later.

**17. Do you think the thank you process could be improved? In what way?**

**P8:** As long as there's a computer generated email so I can keep track of it, I'm happy.

**P7:** I agree

**P10:** I agree. I don't need anything more.

**P11:** They send a post card. The over-thank happens, but I like a postcard because I can just glance at it...

**P7:** I like things with a picture because I can put them on my fridge.

*a. In what ways do you want to be recognized as a donor?*

**P8:** I would like to get a handwritten note on a postcard from a student.

**P11:** I like the little stickers, key chains, etc. I liked getting that little sticky thing because I know it didn't cost them much extra to do it, since they could send it ON the postcard.

**P7:** I'd rather NOT be in the honor roll giving, other than giving anonymously, but I'm too vain to do that.

**P8:** A building named after me would be nice...

**P10:** Wouldn't it be nice if rather than naming it after prominent donors, they just named it after all of us?

**→Do you feel any peer pressure to give? Does it make you want to give when you know your classmates give?**

**Most:** No.

**P7:** I talk to a few people about giving, but it's not pressure to give or not.

**18. How do you anticipate your relationship with your college changing as you become more professionally established or enter your next phase of life? As a donor?**

**P9:** Um...actually starting to give.

**P11:** The next big change in my life will probably be having kids... that will probably decrease my involvement with Grinnell. I won't stop giving, but it might impact the amount of gift since I'll have other priorities. We hosted a student this spring for an extern thing...that sort of engagement is likely to decrease because kids take a whole lot of your time.

**P7:** I was giving more before I went to law school, so it will probably increase again when I'm out of school. My boyfriend might cap my giving because he's not a Grinnellian.

**P8:** I'll be moving away after grad school, so my connection will fade a bit. I'll start having kids too so I probably won't be engaging any more than I already do...probably less. I'll still give though.

**19. Do you feel informed about recent achievements and current issues facing your college?**

**P8:** They try.

**P9:** It's just how well you read what information they provide to you.

**P10:** I think that info is available and I can follow it as closely as I need. Grinnell magazine and Grinnell news online email. I always look at those.

**P11:** I feel similarly.

**P7:** A lot of my info comes from [plans], but I'm not sure if it's info originally from the college... I heard it from friends.

**Lastly, a few big picture questions**

**20. Not all alumni give. How do you want to be treated differently as someone who has given?**

**P7:** I don't

**P8:** I don't

**P11:** I don't, other than the swag.

**Most:** YES, PRO SWAG.

**P10:** Yeah, but I don't want to be treated differently if I were to, for example visit Grinnell

**P11:** It might be nice to get access to ticketed events early for donors if there was a really popular event or something. Or maybe donations to attend.

### **9. How does giving to your college factor into your overall charitable giving?**

**P7:** I give the same amount per month to different things... my giving is flexible based on what's going on in my life. I'll give to one thing each month. But some months it might be the same charity.

**P11:** I think similarly, but I recently became a sustaining member of MPR and we give to our church. In terms of my overall charitable giving, Grinnell is probably like a quarter but it's a priority.

**P10:** Grinnell is the largest institution and largest amount I donate to. I give to lots of smaller theaters, but there's nothing bigger than Grinnell. Scale of institution and important to me are both true.

**P8:** I give to mac and I will donate to other things as one-off events or special reasons. Generally, I don't have a lot of income so charitable giving is not a big part of my life.

**P9:** Same

### **10. What causes you to give repeated donations to any organization (whether that's every year, every pledge drive, or monthly)?**

**P7:** For me, it's if I think it's a well-run organization. Like I believe in some organizations' missions, but if I don't think they're managed well, I won't give.

**P11:** I give if it's an institution that I would feel like the world was worse if it didn't exist. There are plenty of organizations that I feel that way about. I mean, Wikipedia does the banner thing and I try to give to them once a year or so. I really want them to exist.

**P8:** When I do have some income, there are a lot of worthwhile causes, so I think if you're going to be a repeat donor, you should pick a few that you hold close and really believe in. Make sure it's well managed, philosophically close to your heart, and some sentimental attachment.... And I think that's what would separate the charities I would give to regularly vs not. MPR is a good example. Macalester ticks off all those boxes as well.

### **Other comments?**

**P10:** One thing I was thinking about regarding pressure from peers not to give...part of the contribution to that feeling that I have comes from people saying, "I already give a lot of money to Grinnell every month in student loan repayments so I don't need to give them more"

**P11:** Yeah, I hear that all the time. I feel like you're paying for something you received, so it's different than donating. But I wonder if people feel a bait and switch about tuition prices because tuition has increased SO MUCH in the past 10 years or so. It seems like people feel they have been wronged, why do people feel that way?

**P8:** Yeah, I think a lot of people our age feel wronged by the economy. They were told to go to college, get educated, and then get a job. And it hasn't happened for huge, huge numbers of people.

**P11:** Yes, it's a weird argument I'm trying to parse for myself. It's probably because you feel you were sold a false bill of goods.

**P7:** I feel Grinnell has helped me succeed in law school.

**→After you finish your studies, will you feel any differently about giving to graduate school than undergrad?**

**P10:** I really enjoyed my Grinnell experience, I felt taken care of. Not true at the U of M. I don't feel sad not giving to the U of M.

**P9:** The U communicates with me a lot less, and I don't have that sentimental attachment to a graduate education....that I do with Macalester.

**P8:** I can see myself being a donor to U of M law, but I my institutional attachment is much, much less than Macalester. Probably not as much as I'd give to Macalester.

**P7:** I haven't decided yet, but it's a qualitatively different education... I went to law school to become a lawyer. I went to college to become a person. I also have some qualms with how the U of M prepares students.

**P8:** I've had beefs with the administration and I'm grateful for my experience, but I know it hasn't worked out for some of my students. You go to a professional school to get a job, so it's not the same...














**THANK YOU!**

**Appendix C**  
Survey Questions and Results

## Grinnell/Macalester Young Alumni Giving Survey Results Initial Report

Last Modified: 05/20/2014

### 1. What is your age?

#	Answer		Response	%
1	20		0	0%
2	21		0	0%
3	22		4	2%
4	23		12	6%
5	24		20	11%
6	25		26	14%
7	26		35	19%
8	27		28	15%
9	28		19	10%
10	29		11	6%
11	30		8	4%
12	31		10	5%
13	32		9	5%
14	33		4	2%
15	34		1	1%
16	35		0	0%
17	Over 35		0	0%
	Total		187	100%

Statistic	Value
Min Value	3
Max Value	15
Mean	7.82
Variance	7.09
Standard Deviation	2.66
Total Responses	187

**2. The next time I give, I would most like to be thanked by:**

#	Answer		Response	%
1	A student		45	33%
2	The college president		6	4%
3	Any college administrator		7	5%
4	The director of fundraising		7	5%
5	A professor		30	22%
6	Another alum		8	6%
7	A college trustee		3	2%
8	The college at large (no specific person)		32	23%
	Total		138	100%

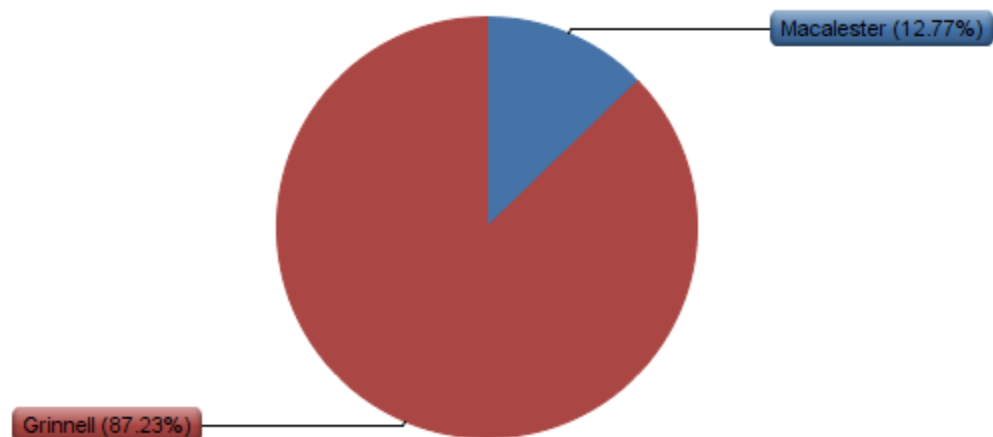
Statistic	Value
Min Value	1
Max Value	8
Mean	4.21
Variance	7.52
Standard Deviation	2.74
Total Responses	138

**3. What year did you graduate from college?**

#	Answer		Response	%
1	2013		12	6%
2	2012		20	11%
3	2011		21	11%
4	2010		34	18%
5	2009		26	14%
6	2008		28	15%
7	2007		8	4%
8	2006		11	6%
9	2005		8	4%
10	2004		11	6%
11	2003		8	4%
	Total		187	100%

Statistic	Value
Min Value	1
Max Value	11
Mean	5.15
Variance	7.18
Standard Deviation	2.68
Total Responses	187



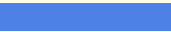

#### 4. Where did you go to college?



#	Answer		Response	%
1	Macalester	<div></div>	24	13%
2	Grinnell	<div></div>	164	87%
	Total		188	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.87
Variance	0.11
Standard Deviation	0.33
Total Responses	188

### 5. Which of the following best characterizes your giving history to your college?

#	Answer		Response	%
1	I have never given.		11	6%
2	I have given once.		43	23%
3	I give some years, but not others.		68	36%
4	I give every year, or multiple times a year.		66	35%
5	I used to give regularly, but have stopped giving.		0	0%
	Total		188	100%

Statistic	Value
Min Value	1
Max Value	4
Mean	3.01
Variance	0.82
Standard Deviation	0.90
Total Responses	188



**6. It is important to me that...**

#	Question	1 Strongly Disagree	2	3	4	5 No Opinion	6	7	8	9 Strongly Agree	Total Responses	Mean
1	I know what the Annual Fund (aka Pioneer Fund) is used for	4.88%	2.44 %	3.66 %	3.05 %	4.88 %	19.51 %	22.56 %	19.51 %	19.51 %	164	6.64
2	My name is included in an "honor roll" of donors during years when I give	23.31 %	14.11 %	10.43 %	3.68 %	17.18 %	12.27 %	9.20 %	2.45 %	7.36 %	163	4.07
3	My gift is used for the purpose I intended	1.23%	1.84 %	0.00 %	0.61 %	6.75 %	10.43 %	19.63 %	16.56 %	42.94 %	163	7.60
4	I find out how my giving contributes to larger college goals	1.83%	1.22 %	2.44 %	3.05 %	8.54 %	22.56 %	22.56 %	18.90 %	18.90 %	164	6.81
5	I can easily find information about my college's financial position, funding, and budget	1.22%	1.22 %	4.27 %	4.88 %	13.41 %	18.29 %	26.22 %	17.07 %	13.41 %	164	6.54

6	I have opportunities to support activities I was involved with as a student	2.44%	1.22 %	4.27 %	3.66 %	10.98 %	15.24 %	18.29 %	19.51 %	24.39 %	164	6.82
7	Current students talk to me about life at the college today	17.68 %	7.93 %	9.76 %	10.98 %	10.37 %	17.68 %	14.02 %	7.93 %	3.66 %	164	4.59
8	Someone at the college thanks me personally for my gift	15.24 %	12.80 %	8.54 %	9.15 %	15.24 %	15.24 %	12.20 %	4.27 %	7.32 %	164	4.56

Statistic	I know what the Annual Fund (aka Pioneer Fund) is used for	My name is included in an "honor roll" of donors during years when I give	My gift is used for the purpose I intended	I find out how my giving contributes to larger college goals	I can easily find information about my college's financial position, funding, and budget	I have opportunities to support activities I was involved with as a student	Current students talk to me about life at the college today	Someone at the college thanks me personally for my gift
Min Value	1	1	1	1	1	1	1	1
Max Value	9	9	9	9	9	9	9	9
Mean	6.64	4.07	7.60	6.81	6.54	6.82	4.59	4.56
Variance	4.49	6.53	2.87	3.12	3.10	3.95	5.95	6.06
Standard Deviation	2.12	2.55	1.69	1.77	1.76	1.99	2.44	2.46
Total Responses	164	163	163	164	164	164	164	164

## 7. What could your college do to get you more excited about giving?

### Text Response

Be honest with me about what my gift does (ie, don't send me letters about students being there because of me, I know that's not true), but also make me feel good about that. Potentially to focus on things about student life I liked.

Grinnell could do a better job supporting the career development of current students and recent alums.

Not have a billion dollar endowment. Not constantly jack up tuition. Not harass me for the sole purpose of raising their alumni donation rate. Could do literally anything to encourage after-college networking or have given me any kind of real guidance when I was in senior year and realizing I had to find a job.

The annoyingness of annual fund calls is 100% the reason why I stopped giving. Sending emails instead of mailings/calls would help. It would also help if everything weren't so glossy and salesy--I was there two years ago; I know what it's really like (and I liked it!)

Communicate more out of the box. Do better with social media. I'm sick of boring letters from a student that I don't even know how they chose.

Be clear about what the money is used for, give examples of what a given donation size can do.

It seems like the "loud" voices in my alum community (on GrinnellPlans) are against giving. I would be more excited if Grinnell had a more pro-giving culture. If I felt like my peers supported me in giving, and like we were all working together in supporting the college.

I give annually and have even when I was a broke graduate student, so there's not a ton they can do to further improve that drive. I was lucky enough to leverage my Macalester education (which was funded in large part by alumni giving) into a well-paying job, and it's my responsibility to pay it forward and try to grant an opportunity like the one I had to some other poor country boy.

I don't think there is anything that Mac could do. I have little or no intention to give again.

Not call me every 5 minutes. Also, provide concrete examples of how my donation helps students.

I think I'd be more excited about giving if the feedback about what my gifts go towards was more realistic to the size/scope of my gift. Don't send me a letter that talks about students who wouldn't be at the school without my gift. I don't give that much. At the same time, it is important to me that there be information about what my gift is doing that feels important and exciting. Also make sure to emphasize and understand the things I enjoyed at school and how those things are still going on, or how current things that are happening are parallel in awesomeness/student experience.

Nothing

Seem like they have their act together, e.g. fix the Forum, make the website look like it wasn't made on geocities, have administrators who stay for more than a year.

Tell me a bit about what they plan on doing with my money - and keep me updated on college events without just asking me for money at the same time!

I'm not sure that I would ever be "excited" about giving; I view the process as a social obligation. I want to help others receive the same formative education and experience the college's dynamic social milieu that so shaped my identity. I am really grateful as well that I received so much merit aid, and I feel really strongly about supporting the college's need blind admissions policy. I think I would feel more engaged if it were more a part of the alumni culture. My fellow classmates definitely mock the giving process on social media. I think there's a lot of unspoken class tension, and I completely recognize that being able to give a sizable donation is a privilege that not all of my classmates have. I get really annoyed with some of the traditional strategies - the mailing campaigns, the phoneathons, special dinners with the President.

Help me understand how the small amount I can give makes a difference. Sometimes I feel that it costs them more to process the gift than I'm giving.

They could contact me less often (maybe just once a year) in order for me to stop feeling like it was annoying to get their phone calls and requests.

- Less frequent calls from students soliciting money (I am really disinclined to give money over the phone) - I don't know, is giving money ever going to be that exciting? I give money in part because I

know that the cost of my education was not covered by the tuition my parents gave. I'll give more money when I'm able because I think a Grinnell education is valuable, not because I get a cell phone decal.

More emphasis on day-to-day student and academic life (and the reassurance that is what my gift will be used to support)--less on buildings and what feels like constant campus expansion programs

Give more concrete example of where my gift will impact.

I actually think Grinnell already does a great job motivating me to give! My work as a volunteer for the Admissions Office is extremely rewarding, I love that our President comes to visit my city to update alums on current happenings, and I feel like I have a strong sense of why giving is important.

I always give when a student calls because my roommate worked for the annual fund and described how tough it was to work there and got to leave early if someone she called contributed. I will generally always wait until a student calls to give.

Grinnell should use a large portion alumni giving, in conjunction with other funds such as the endowment, to lower its tuition. This would make the college more accessible to middle and lower income students. We are never going to win the "Ivy league" battle associated with raising tuition to make our school seem more elite. I went to Grinnell in the first place because it was a "best value" school that offered excellent academics without being extremely pricey. Scholarships and grants help, but there are issues with financial aid that mean that some will still end up paying far more for their education. It is difficult for me to give financially to a school that continues to raise tuition, attracting wealthier students, and dissuading lower and middle income students from even applying. This is not helping our rankings, and if it is helping our finances it is a short sighted approach.

build a scholarship built on student giving, work on recruiting a more diverse student body, lower tuition

Provide concrete examples of what giving accomplishes, and stop using an aggressive telemarketing campaign to incite alumni giving. Make it easier/more fun to give online without having to talk to the Pioneer Fund phone bank.

A fundraising drive for alternative energy production (eg, Grinnell's oft-delayed wind farm)

Innovative asks. Either being able to support career development or demonstrated effort to improve career development through networking/contacting alums.

Provide a clearer idea of what is done with alumni money.

Thank me for volunteering!

Forgive my debts and ensure that the college will always be affordable (and need-blind) so students like me can attend.

Work on engaging alumni who are dissatisfied with the College. Have a less business like approach to education.

I found it kind of annoying when I was a grad student (aka broke) and was getting lots of calls and emails and letters about donating. I wish they would make an effort to find out if the alumni are working or in school or unemployed or whatever instead of approaching all of us the same way (as if we're employed and have a lot of money to give).

Acknowledge non social-justice career paths and that students that pursue these careers after Grinnell are still valuable alumni to the college.

Have a current student call me to chat.

Absolutely nothing. I would give more if I wasn't in grad school.

Excited? I guess I am not that excitable about spending money.

Be way more transparent about their goals for fundraising, the necessity of alumni giving, and their annual budget. Convince me that the College is using the money wisely and frugally. Don't actively scorn the alumni community. Recognize that not everyone can give the same amount.

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They could change the perception of donating. I don't donate because I want the recognition, I donate because I want to support my undergrad.

Not much. Grinnell provided me the opportunity to get to where I am today. I will continue to give to help the next generation. I have a monthly charity/donation budget. I don't like when people/organizations try to get me to give on emotion. I give when I believe in the organization, its mission, and its outcomes.

It's difficult to say. There are a lot of small things that rub me wrong about Grinnell, most notable of which is the fact that, at >\$50k a year, I wouldn't have attended if given the choice today.

I am not sure.

Be more responsive to the way that I give and communicate with the college. I have always given online and each year request to be removed from mailing and call lists, but those lists get reset each year. I would give more if I knew resources weren't being used to mail me things I don't want and call me over and over again.

I felt the most compelled to give after working as an alumni interviewer for prospective students. Being in direct contact with Grinnell staff when talking about this opportunity was definitely energizing.

Have more alumni events

Since I knew a variety of administrators at Grinnell, I often get thank you cards written up by people I know - but without the acknowledgement that we know each other! I wish it were all more personalized. For example, I would respond well to a letter from the Political Science department (one of my majors) stating what they would use funding for, because frankly I have NO idea!

Make small gifts feel more meaningful. Right now a small gift just seems to be seen as an invitation to ask me for more money and not a valued as a gift in and of itself.

Nothing. I give to the extent I can currently financially afford.

Show a greater commitment to the arts

Limit mailings to reduce costs associated with asking for money. I would be more likely to give if the requests came only by email.

Phonathon always gets me, so just keep doing that (ie, requests from current students, coupled with a nice conversation about campus life these days, especially if that student has some activity or academic interest in common with me).

I would be more excited about giving if I felt like the money was going to benefit students who needed my donation, instead of trying to boost the alumni giving rate in order to make Grinnell look more appealing.

Give me a clearer picture of how it's currently using money, what money it has (and where, is it tied up? what does the endowment mean?), and what money it needs. Don't make me feel trivial for not being able to give large amounts of money (the requests for giving often start at \$50, that's a large amount of money for a grad student. I could regularly give \$10-20 but I've been made to feel that donation of that size isn't wanted).

Have more alumni networking opportunities available--both with each other and with current students

Wait until I'm a couple years out to start asking for money! Yes, I am fortunate to have graduated debt free (thanks to my parents), but I am not yet at a place financially where I can donate. Instead of annoying me now with requests for money while I'm in grad school, wait until I will be more able to give. As a current grad student, my desire to give back to Grinnell greatly outweighs my actual ability to give back. I would love it if Grinnell could give more concrete goals and expectations about their fundraising. If they were to say "This semester we need to raise X dollars to achieve Y. If each alumni gave Z then we would meet this goal" I would be more inspired to give, and I would actually feel like my small donations were helping. This sort of campaign could perhaps be targeted at younger graduates who have less to give and would like to feel like small donations can actually have an impact.

Increase its focus on social justice in how it handles my money.

the most significant obstacle to donating to Mac is not having stable employment. Having an event with the Career Development Center and prospective employers exclusively for young alumni would be a huge benefit and increase my desire to give back, knowing it was my gifts that made events like that possible.

Acknowledge areas in which the college can improve, including honest and open conversations about the ways in which the institution fails students (particularly those of color and first gen)

Honestly, I'd be a lot more likely to give if they would just cool it on the asking a little bit. I haven't given this year, and I probably get at least two or three phone calls a week. Plus, they send emails with subject lines like "[Name], we're worried about you!!" It's so annoying that I just stopped responding.

Wait until I have a career. Not ask me when I'm a) still at Grinnell, or b) unemployed, or c) in graduate school accruing student loan debt.

Find more ways to get younger alumni to donor great amounts by other giving levels for newer classes. Something besides the Young President's Club.

Ask for alumni involvement such as with career services and networking. After giving in other ways, feeling valued for that time, and feeling more a part of the community, I would be more likely to give in the future. I wish that the college called on my experiences rather than only calling me for money.

I generally think they do a good job. It's frustrating to hear alumni complain about being asked to give.

Do more to connect me with fellow alumni and prospective students in my city; have more alumni events to keep me excited about the college.

Mostly, I just need to get to a point in my career where I'm making more money. I can barely support myself right now, much less give to the college.

Be more visibly working towards making it easier to do something other than go to grad school after Grinnell - I felt abandoned by the school and the CDO was a joke. It's supposedly better now.

More specific projects to give for.

Allow us to specify where our money goes and make sure there are a variety of options.

I'm not sure - I feel like they do a lot.

Personalize it a bit more...instead of feeling guilty for ignoring the endless calls from phon-a-thon, make alumni feel a bit more excited to give with personal stories from students, professors, and staff and perhaps also from other alumni about why they give.

Honestly? Even though I give every year and it's important to me, it annoys me how often I get mail asking for gifts. I give what I can when phonathon calls. I don't need a million other things in the mail asking for more money when I don't have any more. My friends think phonathon is just about asking for money. I disagree. I worked phonathon as a student, and even though I don't have much to give right now, I always enjoy a long and rich conversation with the students who call for phonathon. While I give regularly already, I think more of my friends would give if they were contacted by the college at time when they weren't asked to give, if they could just enjoy hearing from students and being in touch with the community, and then very occasionally asked if they're willing to give money. Instead, we are often asked for money and rarely given the chance to genuinely reconnect to the community.

more options to direct giving where I want it to go, better communication from students about campus happenings

Emphasize people-to-people connections and impact. I give to specific departments/activities that I still maintain a relationship with and feel connected to.

Let me be very specific about how I want my money to be used, and provide evidence that it is being used in the manner of my choosing.

Nothing; I already believe strongly in the importance of giving and do so excitedly.

Not much right now. My giving is mostly budget bound. I try to rotate through various charitable organizations.

I think the key to alumni giving is face to face alumni community connections. I've now lived in two major metro areas with large grinnell alumni groups, in one city there was regular contact by an email listserv and smaller groups of people who lived near each other or used each other for professional networking. The established alumni in the community held open events in and around town regularly (like every two months or so), and even held a "how to get jobs and network" event that was really successful, where they had alums from tons of different sectors talk about current trends among large employers and other really interesting things. In the current metro area I live in, I think there are actually more alums, but the organizing is little to none and I get the sense that the events that do happen are confined to established friend groups. I would guess that giving support is different between the two areas. Here's what I think is happening: I think that coming out of graduation, most people feel connected to their classmates, but generally are over-conscious of "problems" and "incidents" with the administration. Administrators usually think of this friction as normal because they are aware of how



other campuses operate and most don't think there is anything they can do to please every student, thus some friction is normal and to be expected. While there are always valid points of friction on campus between students and administrative decisions, I think that graduating students are generally over-conscious of these incidents without much context for how student/administrative relations are in other schools or in general if the things happening on campus are a big deal or not a big deal. Throw in stress and love and drugs and alcohol and I think most graduating students over-attribute negative feelings to behavior of the school administrators. At and after graduation, most of my cohort had generally negative feelings towards the school for various reasons and most students I talked to about giving had very complex narratives about why they don't give, or what it would take from the school for the alum to give. However, in general, I don't think people are genuinely alienated from the school or the community. I think the key to getting alumni to give is by showing them how unique their alumni community is in relation to the world around them, and especially young alumni, showing them the real value of being a Grinnellian or Mac-person after college. The relationship has to keep developing. For young alumni especially, the more their relationship to the school can become about being in a community with other alums and not about memories of their time on campus, the more their relationship will evolve and their original narrative about "I don't give because the administration doesn't do... or doesn't understand... or doesn't support student identity X..." will start to give way. I've found that engaging alumni after 4 years starts to get pretty variable, there are a lot of students who previously had real beefs with the school who now just don't give out of habit, but really aren't wedded to their old story, even though they will still repeat it. I think part of that is perspective, that once alums have seen shitty bureaucracies all over the United States and the world, they feel less strongly that Grinnell was doing something wrong, or at least don't think that the standard they set at 21 was reasonable. So part of it is just that, and the other part is that the relationship evolves and the value of the alumni status means something different than the books read at school, it's now about the community in their city/region/online. So I think the school should find ways to better facilitate communities in the US, they do an okay job in some metros, but definitely have a "if there are key alumni who volunteer then it works if there aren't then it won't work" attitude, which is wrong. So many people could take on a small volunteering role to organize local events, and a pre-disposition to do so is not necessary, the school could really help out finding reasons for alums to get together and not just to watch a lecture at the same time, but to face-to-face each other.

Increase connections between alumni and students that does NOT involve a student calling and either asking for money or thanking for a gift. I would be more excited if I were involved in activities such as coming back to campus to speak or conducting information interviews with students interested in the field I work in.

If they demonstrated all the cool things they're doing with our donations, that would make it more exciting to give back. You would then feel like you're contributing towards a cause you can get behind.

Write hand written thank you notes; have a class agent to update us on our class; share with me what the school priorities are; not give \$300k to SGA and waste money.

I don't really need to be excited to give--I'm going to give anyway. But, I would like to hear more about specific places/programs where I could give (though I know that's not necessarily what the college would prefer)

Give me specific goals to be contributing toward. You know how food banks say, "\$5 feed X people"? Or how environmental groups say "If 10 people contribute \$50 we can do X"? That kind of thing gives me a much better sense of what I'm giving money to do, and is much more important to me than making a particular level on the honor roll list.

Maybe more of those small rewards, like key chains, stickers.

\* Make it clear that they're actually using my money to do good, and that they're being financially responsible rather than wasting my donations. \* Make it clear that they value me in ways that don't involve my pocketbook. \* Update me on college goings-on in ways that don't feel like a sales pitch (e.g., semi-objective summaries of what various departments are doing: "Professor x has joined the philosophy department. She specializes in...") \* Contact me for things that don't involve money.

Demonstrate the difference donations make

I give on a schedule once-per year. I do not feel the need to waste the money and resource on advertising to me that I should give. The money used for all the pamphlets and publications sent out could be reapportioned to the areas of the college that need the funding.

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I would be more excited about giving to my college if fundraising events and strategies helped bring alumni into contact with one another. What if they had giving drives during specific times of the year sort of like NPR's drives? Or, what if there were some kind of alumni social media event organized by the college? Perhaps the college could host some kind of forum (either over chat or video even???) where alumni could discuss something going on at the college or just in the world. Since plans already serves as a forum for discussion, maybe the college could make their event different by pairing people up randomly to discuss a topic, sort of like chat roulette or something. It might foster some new relationships between alumni. The buy-in would have to be cheap to get many people to be a part of it.

NA. I want to support my school, and will continue to give.

Help us find better jobs

Create a social incentive to donate -- the more people I know who donate, the more likely I am to donate. Make it very easy to donate, but also don't ask too often.

Statistic	Value
Total Responses	92

## 8. Please estimate your annual income (personal not household)

#	Answer		Response	%
1	Below \$20,000		38	28%
2	\$20,000 - \$39,999		39	28%
3	\$40,000 - \$59,999		37	27%
4	\$60,000 - \$79,999		10	7%
5	\$70,000 - \$99,999		6	4%
6	\$100,000 or more		8	6%
	Total		138	100%

Statistic	Value
Min Value	1
Max Value	6
Mean	2.50
Variance	1.92
Standard Deviation	1.38
Total Responses	138





## 9. To what extent do you agree or disagree with the following statements?

#	Question	1 Strongly Disagree	2	3	4	5 No Opinion	6	7	8	9 Strongly Agree	Total Responses	Mean
1	I feel like I am part of a thriving alumni community	1.88%	1.88%	10.00%	9.38%	6.88%	17.50%	20.63%	14.38%	17.50%	160	6.29
2	I want more personal contact with students or professors at my college	3.75%	10.63%	13.75%	20.00%	20.63%	16.88%	9.38%	3.13%	1.88%	160	4.58
3	I believe my college uses my gifts wisely	0.63%	0.63%	4.38%	8.75%	16.88%	23.13%	27.50%	11.88%	6.25%	160	6.17
4	I know how my college uses alumni gifts	4.38%	8.13%	12.50%	17.50%	7.50%	20.63%	16.88%	9.38%	3.13%	160	5.11
5	It would take a lot for me to lose trust in my college.	1.26%	2.52%	10.06%	13.21%	7.55%	21.38%	15.72%	15.09%	13.21%	159	6.05
6	I am	7.50%	9.38	9.38	16.25	31.25	11.25	10.63	1.88	2.50	160	4.5

	thanked too much for my gifts		%	%	%	%	%	%	%	%		5
7	I know what the fundraising priorities are for my college	7.55%	5.03 %	12.58 %	16.35 %	8.81 %	19.50 %	17.61 %	5.03 %	7.55 %	159	5.13
8	I can find my college's annual report if I want it	3.13%	3.75 %	5.00 %	8.75 %	20.00 %	21.88 %	14.38 %	10.00 %	13.13 %	160	5.91
9	I am listed correctly in the "honor roll" of donors during years that I give	5.00%	3.13 %	2.50 %	1.25 %	36.25 %	11.88 %	5.63 %	12.50 %	21.88 %	160	6.13



Statistic	I feel like I am part of a thriving alumni community	I want more personal contact with students or professors at my college	I believe my college uses my gifts wisely	I know how my college uses alumni gifts	It would take a lot for me to lose trust in my college.	I am thanked too much for my gifts	I know what the fundraising priorities are for my college	I can find my college's annual report if I want it	I am listed correctly in the "honor roll" of donors during years that I give
Min Value	1	1	1	1	1	1	1	1	1
Max Value	9	9	9	9	9	9	9	9	9
Mean	6.29	4.58	6.17	5.11	6.05	4.55	5.13	5.91	6.13
Variance	4.41	3.28	2.47	4.35	4.20	3.51	4.90	4.12	4.93
Standard Deviation	2.10	1.81	1.57	2.08	2.05	1.87	2.21	2.03	2.22
Total Responses	160	160	160	160	159	160	159	160	160

### 10. In the past year, I have attended an event organized by my college or an official alumni group

#	Answer		Response	%
1	Yes		82	59%
2	No		58	41%
	Total		140	100%



Statistic	Value
Min Value	1
Max Value	2
Mean	1.41
Variance	0.24
Standard Deviation	0.49
Total Responses	140

### 11. In the past year, I have volunteered for my college in some way

#	Answer		Response	%
1	Yes		50	36%
2	No		90	64%
	Total		140	100%

















Statistic	Value
Min Value	1
Max Value	2
Mean	1.64
Variance	0.23
Standard Deviation	0.48
Total Responses	140

## 12. Since finishing college, I have held at least one unpaid internship

#	Answer		Response	%
1	Yes		38	27%
2	No		102	73%
	Total		140	100%




Statistic	Value
Min Value	1
Max Value	2
Mean	1.73
Variance	0.20
Standard Deviation	0.45
Total Responses	140

**13. The next time I give, I want my gift to support:**

#	Answer		Response	%
1	General college operations		33	24%
2	The area of greatest need		72	52%
3	Financial aid and scholarships		104	75%
4	Internships and career development		57	41%
5	Off-campus study		36	26%
6	Student research and scholarship		65	47%
7	Teaching and curriculum development		55	40%
8	Faculty research and scholarship		43	31%
9	Student activities and clubs		58	42%
10	The academic department(s) of my choice		61	44%
11	Athletics		6	4%
12	Student recruitment and outreach		21	15%
13	Alumni events and resources		6	4%
14	Residential life		18	13%
15	State-of-the-art tools and technology		17	12%
16	Facility renovation or expansion		7	5%

Statistic	Value
Min Value	1
Max Value	16
Total Responses	139

### 14. In your last year of college, did you give as part of a "senior challenge" or "senior class gift" drive?

#	Answer		Response	%
1	Yes		104	59%
2	No		47	27%
3	Don't remember		25	14%
	Total		176	100%

Statistic	Value
Min Value	1
Max Value	3
Mean	1.55
Variance	0.53
Standard Deviation	0.73
Total Responses	176

**15. It's important that my college...**

#	Question	1 Stron gly Disag ree	2	3	4	5 No Opini on	6	7	8	9 Stron gly Agree	Total Respon ses	Me an
1	Acknowledge my gift in a timely manner	5.59%	3.73 %	6.21 %	8.70 %	20.50 %	19.88 %	15.53 %	9.32 %	10.56 %	161	5.6 6
2	Updates me regularly on news and life at the college	2.48%	4.35 %	4.35 %	4.35 %	9.94 %	28.57 %	17.39 %	18.01 %	10.56 %	161	6.2 4
3	Considers my opinions when planning how to use my gift	2.48%	0.00 %	2.48 %	3.73 %	6.83 %	19.88 %	25.47 %	19.25 %	19.88 %	161	6.8 9
4	Thanks me for giving with small perks like a keychain or card at the holidays	26.09 %	13.04 %	9.94 %	9.94 %	14.29 %	14.91 %	5.59 %	3.11 %	3.11 %	161	3.7 5
5	Considers me a friend	6.21%	7.45 %	6.21 %	8.07 %	22.36 %	20.50 %	13.04 %	8.70 %	7.45 %	161	5.3 5
6	Keeps its promises about how it will use alumni gifts	0.00%	0.00 %	0.00 %	0.62 %	3.11 %	3.73 %	13.66 %	20.50 %	58.39 %	161	8.2 5
7	Acts in a socially responsible manner when using alumni gifts	0.62%	0.00 %	0.00 %	0.00 %	2.48 %	3.11 %	15.53 %	24.22 %	54.04 %	161	8.2 0

8	Knows who I am and what I'm interested in	4.35%	4.35 %	7.45 %	9.94 %	13.66 %	16.15 %	24.22 %	9.32 %	10.56 %	161	5.80
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Statistic	Acknowledges my gift in a timely manner	Updates me regularly on news and life at the college	Considers my opinions when planning how to use my gift	Thanks me for giving with small perks like a keychain or card at the holidays	Considers me a friend	Keeps its promises about how it will use alumni gifts	Acts in a socially responsible manner when using alumni gifts	Knows who I am and what I'm interested in
Min Value	1	1	1	1	1	4	1	1
Max Value	9	9	9	9	9	9	9	9
Mean	5.66	6.24	6.89	3.75	5.35	8.25	8.20	5.80
Variance	4.50	3.79	3.10	5.45	4.60	1.19	1.31	4.54
Standard Deviation	2.12	1.95	1.76	2.34	2.15	1.09	1.15	2.13
Total Responses	161	161	161	161	161	161	161	161

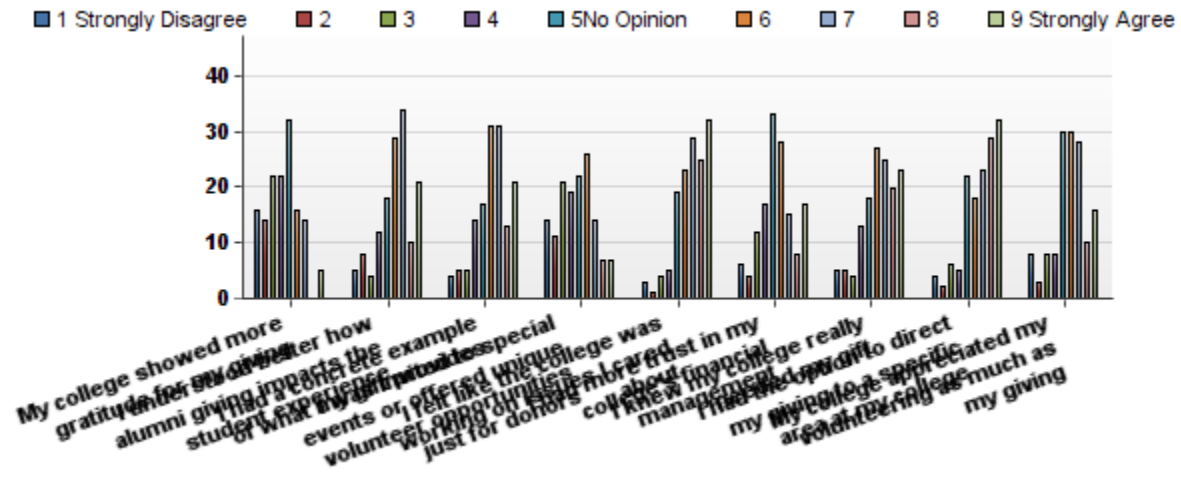
## 16. What caused you to stop giving to your college?

Text Response

Statistic	Value
Total Responses	0



**17. I would be more likely to continue giving if...**



#	Question	1 Strongly Disagree	2	3	4	5No Opinion	6	7	8	9 Strongly Agree	Total Responses	Mean
1	My college showed more gratitude for my giving	16	14	22	22	32	16	14	0	5	141	4.23
2	I understood better how alumni giving impacts the student experience	5	8	4	12	18	29	34	10	21	141	6.04
3	I had a concrete example of what my gift provides	4	5	5	14	17	31	31	13	21	141	6.14
4	I was invited to special events or offered unique volunteer opportunities just for donors	14	11	21	19	22	26	14	7	7	141	4.67
5	I felt like the college was working on issues I cared about	3	1	4	5	19	23	29	25	32	141	6.82
6	I had more trust in my college's financial management	6	4	12	17	33	28	15	8	17	140	5.52
7	I knew my college really needed my gift	5	5	4	13	18	27	25	20	23	140	6.24
8	I had the option to direct my giving to a specific area at my college	4	2	6	5	22	18	23	29	32	141	6.70

9	My college appreciated my volunteering as much as my giving	8	3	8	8	30	30	28	10	16	141	5.82
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#	Question	1 Stron gly Disag ree	2	3	4	5No Opini on	6	7	8	9 Stron gly Agree	Total Respon ses	Me an
1	My college showed more gratitude for my giving	11.35 %	9.93 %	15.60 %	15.60 %	22.70 %	11.35 %	9.93 %	0.00 %	3.55 %	141	4.23
2	I understood better how alumni giving impacts the student experience	3.55%	5.67 %	2.84 %	8.51 %	12.77 %	20.57 %	24.11 %	7.09 %	14.89 %	141	6.04
3	I had a concrete example of what my gift provides	2.84%	3.55 %	3.55 %	9.93 %	12.06 %	21.99 %	21.99 %	9.22 %	14.89 %	141	6.14
4	I was invited to special events or offered unique volunteer opportunities just for donors	9.93%	7.80 %	14.89 %	13.48 %	15.60 %	18.44 %	9.93 %	4.96 %	4.96 %	141	4.67
5	I felt like the college was working on issues I cared about	2.13%	0.71 %	2.84 %	3.55 %	13.48 %	16.31 %	20.57 %	17.73 %	22.70 %	141	6.82
6	I had more trust in	4.29%	2.86 %	8.57 %	12.14 %	23.57 %	20.00 %	10.71 %	5.71 %	12.14 %	140	5.52

# KEEPING YOUR FRIENDS CLOSE 100

	my college's financial management											
7	I knew my college really needed my gift	3.57%	3.57%	2.86%	9.29%	12.86%	19.29%	17.86%	14.29%	16.43%	140	6.24
8	I had the option to direct my giving to a specific area at my college	2.84%	1.42%	4.26%	3.55%	15.60%	12.77%	16.31%	20.57%	22.70%	141	6.70
9	My college appreciated my volunteering as much as my giving	5.67%	2.13%	5.67%	5.67%	21.28%	21.28%	19.86%	7.09%	11.35%	141	5.82

Statistic	My college showed more gratitude for my giving	I understood better how alumni giving impacts the student experience	I had a concrete example of what my gift provides	I was invited to special events or offered unique volunteer opportunities just for donors	I felt like the college was working on issues I cared about	I had more trust in my college's financial management	I knew my college really needed my gift	I had the option to direct my giving to a specific area at my college	My college appreciated my volunteering as much as my giving
Min Value	1	1	1	1	1	1	1	1	1
Max Value	9	9	9	9	9	9	9	9	9
Mean	4.23	6.04	6.14	4.67	6.82	5.52	6.24	6.70	5.82
Variance	4.01	4.41	4.05	4.77	3.49	4.25	4.43	4.18	4.21
Standard Deviation	2.00	2.10	2.01	2.18	1.87	2.06	2.10	2.05	2.05
Total Responses	141	141	141	141	141	140	140	141	141

## 18. What is your gender?

#	Answer		Response	%
1	Female		102	74%
2	Male		35	25%
3	Other		1	1%
	Total		138	100%

Other

Statistic	Value
Min Value	1
Max Value	3
Mean	1.27
Variance	0.21
Standard Deviation	0.46
Total Responses	138

## 19. To what extent to you agree or disagree with the following statements?

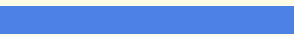

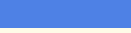


#	Question	1 Stron gly Disag ree	2	3	4	5No Opini on	6	7	8	9 Stron gly Agree	Total Respon ses	Me an
1	I feel well informed about the projects I give to at my college	3.47 %	5.56 %	11.8 1%	19.4 4%	15.97 %	18.0 6%	15.9 7%	3.47 %	6.25 %	144	5.1 2
2	My college acknowledges my past giving when asking for new gifts	3.50 %	4.20 %	10.4 9%	9.09 %	21.68 %	18.1 8%	13.9 9%	5.59 %	13.29 %	143	5.5 9
3	I always get a receipt for my gift	4.17 %	4.17 %	2.08 %	4.17 %	22.92 %	15.2 8%	13.1 9%	9.72 %	24.31 %	144	6.3 1
4	College administrators tell me the truth about my school	2.08 %	3.47 %	7.64 %	13.1 9%	17.36 %	22.2 2%	22.9 2%	8.33 %	2.78 %	144	5.5 7
5	I know how well my college is doing	0.69 %	2.78 %	6.94 %	12.5 0%	11.81 %	20.8 3%	31.2 5%	7.64 %	5.56 %	144	5.9 1
6	The only time I hear from my college is when they want me to give	11.11 %	11.1 1%	20.8 3%	13.1 9%	2.08 %	11.1 1%	9.72 %	9.72 %	11.11 %	144	4.7 2

7	My college manages its money well	0.69 %	2.78 %	1.39 %	6.94 %	24.31 %	18.0 6%	27.7 8%	11.1 1%	6.94 %	144	6.1 4
8	I am proud to be an alum of my college	0.69 %	0.00 %	0.00 %	0.69 %	3.47 %	2.08 %	14.5 8%	21.5 3%	56.94 %	144	8.2 0

Statistic	I feel well informed about the projects I give to at my college	My college acknowledges my past giving when asking for new gifts	I always get a receipt for my gift	College administrators tell me the truth about my school	I know how well my college is doing	The only time I hear from my college is when they want me to give	My college manages its money well	I am proud to be an alum of my college
Min Value	1	1	1	1	1	1	1	1
Max Value	9	9	9	9	9	9	9	9
Mean	5.12	5.59	6.31	5.57	5.91	4.72	6.14	8.20
Variance	3.87	4.50	4.94	3.11	2.99	6.86	2.61	1.53
Standard Deviation	1.97	2.12	2.22	1.76	1.73	2.62	1.62	1.24
Total Responses	144	143	144	144	144	144	144	144



**20. Which of the following best describes your employment status?**

#	Answer		Response	%
1	I am employed full-time		87	62%
2	I am employed part-time		10	7%
3	I am a full time student		39	28%
4	I am not currently employed		1	1%
5	Other		3	2%
	Total		140	100%

Statistic	Value
Min Value	1
Max Value	5
Mean	1.74
Variance	1.06
Standard Deviation	1.03
Total Responses	140

## Appendix D

Transcript: Interview with Macalester Associate Annual Fund Director

**Q: What kinds of stewardship communications does Macalester send to the average annual fund donor?**

Well, there's a quarterly donor newsletter called Giving Matters, and that goes to everyone but sustainers. Sustainers get something instead specific for them—I think it's called the Sustainer Update? It's also quarterly. Then there's Mac Wire, which is monthly, and all alumni get that. That's out of Alumni Relations. Grand Society members get a welcome packet when they join, but that might be a higher level donor than you want to consider since it's \$1,600+

**Q: Who oversees annual fund stewardship efforts?**

There's no one in particular in the Annual Fund or in Communications who oversees stewardship communications. I mean, you and Marin in Donor Relations obviously do the higher-level stuff, but it's kind of spread out among all the Associate Directors and the Director in the Annual Fund. Jeannette tends to do more of the writing for our newsletters I suppose.

**Q: So, you mentioned some ongoing stewardship communications, what about one-offs or short lived stewardship things you've tried in the past?**

We've done welcome packages for new sustainers in the past. I think they get an email now, but we used to do something more high-touch. I'm not even sure how consistent that welcome email is. It might be more like our goal is to send it at some point in the first year that they're a sustainer. They get automatic emails; of course, letting them know their gift is going through every month. And then they get a yearly statement and thank you at the end of the calendar year too.

I didn't mention this earlier, but we do a thank you card for all donors at the end of the fiscal year, usually early to mid-June. It's usually a post card but I think we've done letters in the past too. And then sometimes we do thank you callers for B and C level donors. And there's the online donor roll which goes live in the Fall. Marin knows more about that.

**Q: Do we mail the printed annual report to all donors?**

No, it's all online now and there's an email we send out to notify folks when it's available. I mean, we do mail some printed reports, but only to a select group. Like trustees and endowed fund donors and special prospects. But the online material is the same as what's in the printed report.

Oh, what about anchor mailings? We do mailings to the big reunion years each year (50<sup>th</sup>, 40<sup>th</sup>, 30<sup>th</sup>, 20<sup>th</sup>, 10<sup>th</sup>) to remind them to give in honor of the anniversary. They're customized by class year and come from the class agents. They're written by the class agents, actually. It's a

solicitation, but it has a lot of stewardship messaging. And then there's a generic version for non-reunion years too that goes out at the same time.

**Q: What about the magazine, Mac Today? How do we get donor stories into the magazine?**

We should have a process for that, but we don't. There's no mechanism to convey stewardship messages right now. It's kinda just whatever Lynn (the editor) wants to do. Sometimes it aligns with strategies we have in annual fund, but not always. I wish there was more coordination between the editorial agenda and the annual fund agenda. I think the writers—the magazine staff—they're reluctant to include annual giving messages.

**Q: Who do you consider Macalester's peers for annual giving programs?**

Definitely Carleton, Gustavus, Grinnell. Carleton has a higher participation rate and a larger staff, both things Mac would love to have. They're a bit more professional than us. We get ideas from Carleton. There's also an annual fund professional group – STAAF, I think. We get invited some years—it's this exclusive thing started by some east coast schools decades ago and they invite select colleges to participate every year... we've gotten invited a few years in a row. The other colleges in that group would be our peers.

**Q: You mentioned Carleton as a kind of aspirational peer. Can you say more about what you wish our program had they theirs has?**

I mean, we'd love to be at 50% for participation rate. That's the big thing.

**Q: Have you done any research on annual giving stewardship before?**

We're doing a sustainer survey right now, but that doesn't ask a lot—maybe, none, now that I think about it—not a lot of stewardship questions. It's more just about the sustainer program in general.

**Q: Tell me about the Yes, Macalester! Stewardship packages. Those looked unique.**

Yeah, so we knew—since this was a campaign about individual choice—that we'd need to follow up with something more personal. So commissioned an art print from an alum and we did different thank you notes with customized content based on the area that people gave to.

**Q: You mentioned “B” and “C” group donors before. Can you explain how you prioritize donor groups?**

Yeah, so A donors are the summit society members—people who have given consistently over 5+ years. You may have heard of the Old Main Society too, which is 25 years of giving, non-consecutive. Group B is those who have given in the last 5 years. Pybunts as some schools call them. Group C is people who have given at some point, but not in the last 5 years. So they are like long-lapsed donors. And then group D is those who have never given at all.

We use those prioritizations to target solicitations a lot. Like, we really wanted the Yes, Macalester! Initiative to resonate with B's and C's, but most donors were A's, those who are already giving anyway. It helped boost dollars, but not donors.

**Q. Is there anything else you've done to "test" like that recently?**

We did a political science even this fall that was meant to test whether affinity around an academic discipline would stir greater interest in giving. I'm not sure it was worth all the effort involved, though. I haven't heard final results, but that's probably telling in itself since the event was back in the fall. We might try it again with a different department, but we'll see.

**Q. Can you tell me a little bit about the standard thank you process for your average annual fund giving?**

Yeah, it's actually Judy in your department that handles that. If they give online, they get an automatic thank you email. And sustainers get the monthly confirmations. Then there's a printed thank you letter too, and that's signed by Marin or Danielle, depending on the gift size. And that's it, I think.

**Q: Did we send anything to donors for the holidays this past year?**

No, we didn't. We have in past years. I think the president did a video a year or two ago. A spoof on Dickens' A Christmas Carol, you know, since he's a Dickens scholar. But nothing this year.

**Q. Can I just clarify something? The Grand Society gets extra stewardship, right?**

Yes, we usually do one or two extra little things for them every year. Like, they did something this fall where they sent a copy of the Mac Weekly (the student newspaper) to every Grand Society member. I think people liked that, but it was very time intensive.

**Q: I think that's all of the questions I have for now. Thank you!**

**Appendix E**

Sample Message Units from Content Analysis

MACALESTER  
COLLEGE



# GIVING MATTERS

Fall 2013

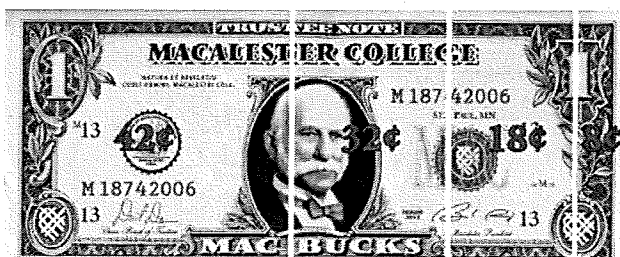
Dear %%Joint Salutation%%,

Greetings! Welcome to the latest edition of "Giving Matters," your quarterly Annual Fund donor newsletter. Each edition will explore how your gift makes an impact, connect you to campus today, and provide opportunities to make a greater impact at Mac.

Thank you for supporting the Macalester community!

Danielle Nelson '05  
Director of the Annual Fund

## How is your Annual Fund gift used?



**42¢ - Faculty and Staff:** Macalester is a community of committed individuals working for students. Your gift helps maintain a low student to faculty ratio, recruit and retain faculty and staff, and provide faculty-supervised research opportunities for students.

**32¢ - Financial Aid:** Access to Macalester is a central part of the college's mission. With over 74 percent of students receiving financial aid, your Annual Fund support impacts the majority of students' ability to attend Mac.

**18¢ - Programming:** The Annual Fund supports the Macalester experience through programs like study abroad, internships, student health services, career development, and co-curricular activities.

**8¢ - Daily Needs:** Your gift helps maintain day-to-day operations. Just like you, Macalester has a heating bill to pay, a lawn to mow, and software updates to maintain.

Have friends and alumni been telling you they don't give to Macalester because they don't know where their donations go? [Send them a link!](#)

## Thank you!

Each year, thousands of alumni, parents, students, faculty, staff and friends step up to match their philanthropy to their spirit for Macalester. Because of you, Macalester has the financial resources to provide an exceptional education to an economically diverse group of students. [Check out our Honor Roll of Donors!](#)

## Spread the word

Thank you for your continued support! Help Macalester reach its fundraising goals by inviting your Facebook friends to become donors too.



**Join me in supporting Macalester!**  
Support everything you love about Macalester College by making a gift. Annual Fund gifts go toward financial aid, academic excellence, faculty research, and more.

## Your giving

You made your last gift on %%AFMonthlyAsk%%.  
Macalester's fiscal year runs June 1-May 31. Thank you for your support!

[View your giving history in MacDirect](#)

## Questions?

Please contact Amelia Nielsen '08, Annual Fund Assistant, at [anielsen@macalester.edu](mailto:anielsen@macalester.edu) or 651-696-6784.

## Feedback?

What would you like to see in the donor newsletter? Share your ideas with Jeanette Beger at [jbeger@macalester.edu](mailto:jbeger@macalester.edu) or 651-696-6999.

# THANK YOU

Dear Nick,

I want to thank you for investing in Macalester during the 2013 fiscal year, which ended May 31. Your support helped Mac students and faculty members make their mark all over the world this year, from 1600 Grand to Australia and Uganda. Today I'm pleased to share with you our annual report, the Honor Roll of Donors.



When you visit the Honor Roll of Donors, you can:

- Find yourself (and your classmates) in the honor roll.
- Keep current about Mac through stories about the accomplishments of students.
- Learn more about the impact your gifts make on campus and around the world.

If you have questions about the Honor Roll of Donors, please contact Marin Amundson-Graham, director of Donor Relations, at [donorrelations@macalester.edu](mailto:donorrelations@macalester.edu).

I thank you for your past support and extend heartfelt thanks to donors who have already renewed their support for the 2014 fiscal year.

With gratitude,

Brian Rosenberg  
President, Macalester College

 **MACALESTER COLLEGE**

This annual message about Macalester's Honor Roll of Donors was sent by the Advancement Office of Macalester College, 1600 Grand Ave., St. Paul, MN 55105, US

This message was originally sent to [raleigh@macalester.edu](mailto:raleigh@macalester.edu)  
[Update/Unsubscribe](#)

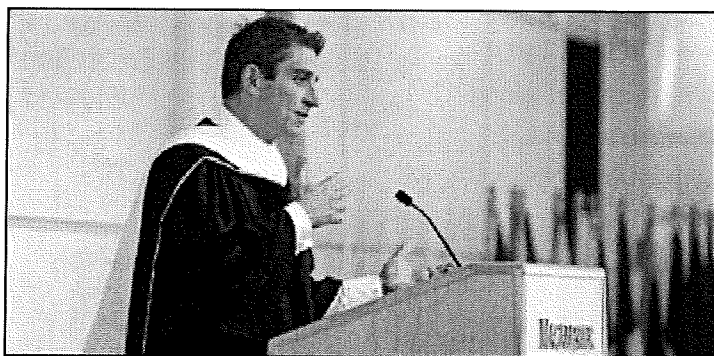
Inaugural poet Richard Blanco opens academic year, Quick facts about the Class of 2017, Heather Lendway '06 is U.S. Triathlon champ, Christina Fitzsimmons '11 is Macbassador of the Month, and more...  
*Trouble viewing this message? View it in your browser.*

# Mac Wire

The e-newsletter for Macalester alumni, parents, and friends.

**September 2013**

## Inaugural poet Richard Blanco opens academic year



**Richard Blanco**, inaugural poet for President Barack Obama, was awarded an honorary degree from Macalester and spoke at Opening Convocation on Wednesday, Sept. 11. Blanco talked about the importance of a liberal arts education and shared several poems with the capacity crowd in Kagin Commons. "I am a better engineer because I am a poet," he said, "and I am a better poet because I am an engineer." Blanco told Macalester students that "no knowledge is wasted" and encouraged students to "be critical, but with love."

## In This Issue

[MAC in the City happens in 29 cities worldwide Oct. 3](#)

[Quick facts about the Class of 2017](#)

[Provide your input for strategic planning](#)

[Heather Lendway '06 is U.S. Triathlon champ](#)

[Macbassador of the Month: Christina Fitzsimmons '11](#)

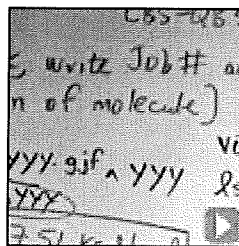
[Class Notes](#)

[Share Your News](#)

[Read Past Editions](#)

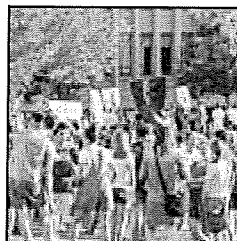
[Manage Subscription](#)

## Video of the Month



[Messy Science](#)

## Recent Photos



[Orientation 2013](#)

## Share this Edition

[Share](#)

**MAC in the City happens in 29 cities worldwide Oct. 3**





Macalester alumni in cities worldwide will gather for our annual MAC in the City the evening of Thursday, Oct. 3. Events will be held in 29 cities including New York City, D.C., and San Francisco, many other U.S. cities, as well as Bangkok, Cairo, London, and Dakar.

MAC in the City (Macalester Alumni Connect in the City) is an opportunity for alumni, whether new to a region or lifelong residents, to meet each other, reflect upon their shared experiences at Macalester, and share insights about their city's resources.

**See list of locations and register to attend**

[↑ Top](#)

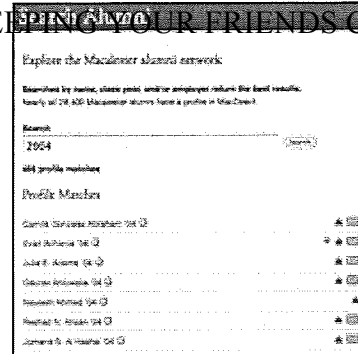
## Quick facts about the Class of 2017

Who are the members of the Macalester's Class of 2017? Vice President of Student Affairs **Laurie Hamre** answered this question in the speech she gave at the new student convocation during orientation.

Here are some quick facts about our newest students:

- 556 first-year students and 13 transfer students
- 49 Countries of citizenship including the U.S.
- U.S. States/Territories: 45 plus D.C., Puerto Rico, and Guam
- Women: 59 percent
- Students of color (self reported): 22 percent
- International students:
- Top five intended majors:
  1. international studies
  2. political science
  3. biology
  4. psychology
  5. economics
- Top seven states:
  1. Minnesota (15%)
  2. California
  3. Illinois
  4. Wisconsin
  5. Massachusetts
  6. New York

## KEEPING YOUR FRIENDS CLOSE 112



Use MacDirect, Mac's alumni directory, to find your Macalester classmates.

### **Use MacDirect**

7 p.m. Thursday, Sept. 19  
**SPASM (Scots Pride Alumni-Student Mixer)**  
**Student/Alumni Reception**  
 Boardroom, Weyerhaeuser Hall

Thursday, Oct. 3  
**MAC in the City**  
*Various cities, worldwide*

7 p.m. Friday, Oct. 4  
**Dig Pink with Mac's Volleyball Team**  
 Alumni Gym, Leonard Center athletic & wellness complex

1 p.m. Saturday, Oct. 5  
**Kick Cancer with Women's Soccer**  
 Stadium

Thursday, Oct. 10  
**International Roundtable 2013 - Global Health: Promoting Equity Within and Across Borders**  
 JBD Lecture Hall and breakout rooms 204-215, Ruth Stricker Dayton Campus Center

2:30 p.m. Friday, Oct. 11  
**Geology Alumni Extravaganza**  
 Olin-Rice Science Center  
 Registration is now open

6 p.m. Saturday, Oct. 12  
**M Club Hall of Fame Dinner**  
 Alexander G. Hill Ballroom, Kagin Commons

65 non-resident, 38  
dual citizens, and 7  
U.S. permanent  
residents

- 39 languages spoken  
at home
- 423 different high  
schools attended

The Macalester student body hails from 49 states (we're missing Wyoming) and 94 countries.

7. Washington  
• 6,683 applied

**KEEPING YOUR FRIENDS CLOSE 113**  
**Discuss The Golem and  
the Jinni with Portland  
area alumni**  
*Hosted by Kim Brown '74*

1:30 p.m. **Thurs., Oct. 19**  
**Cheer on the Scots in  
Chicago**

*Amos Alonzo Stagg Field,  
Ellis Ave. & Cottage Grove  
Ave., Chicago*

9 a.m. **Saturday, Oct. 26**  
**Macbassador (Alumni  
Volunteer) Conference**

*Ruth Stricker Dayton  
Campus Center*

1-3 p.m. **Sunday, Oct. 27**  
**Tour Mount Auburn  
Cemetery with Boston  
area alumni**

*Mount Auburn Cemetery,  
580 Mt Auburn St.,  
Cambridge*

**Saturday, Nov. 2**  
**Food Drive with Mac  
Athletics**

*Macalester Stadium*

7:30pm **Thurs., Nov. 7**

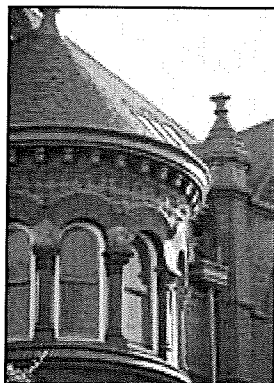
7:30 p.m. **Fri., Nov. 8**

2 & 7:30 p.m. **Sat., Nov. 9**

**Macalester presents The  
Government Inspector**

*Main Stage Theatre, Theater  
Building*

## Provide your input for strategic planning



Help shape the future of Macalester by providing feedback for strategic planning. The Board of Trustees has provided several framing questions to help structure the planning process.

Examples include:

**What are the distinctive and  
attractive strengths of Macalester?**

**How can we best ensure that students are also  
receiving sound preparation for rewarding and  
successful careers?**

**What steps should be taken to assess, maximize, and  
promote the personal and intellectual benefits of the  
residential college experience?**

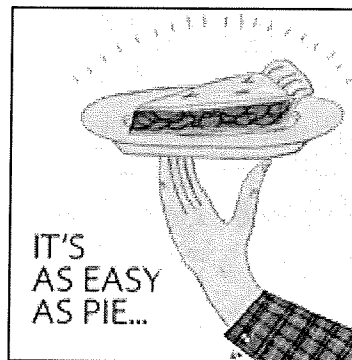
**What role should information technologies, including  
evolving technologies associated with distance  
learning, play at the college over the next several  
years and beyond?**

The [strategic planning website](#) includes a complete list of framing questions as well as additional information about the planning process. Please [share your thoughts](#) about any of these questions.

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**Heather Lendway '06 is U.S. Triathlon champ**

Former Macalester swimming and



We thank our [Annual Fund  
Sustainers](#) for providing  
reliable, ongoing support for  
Macalester.



water polo standout and yMac (young Macalester alumni connect) co-chair **Heather Lendway '06** posted a phenomenal performance to win the 2013 USA Triathlon Olympic-Distance National Championships, held in August in Milwaukee, Wis.

With her performance, Lendway earned a coveted spot to represent the U.S. at the 2014 ITU World Championships in Edmonton, Canada, set for Aug. 27-Sept. 2, 2014. Join us in congratulating her for this great achievement.

[Read the Mac Athletics story](#)

[More on USAtriathlon.org](#)

## KEEPING MAC IN SOCIAL MEDIA CLOSE 114

Many alumni, parents, and friends connect with Mac via social media. *Do you?*

[MacDirect](#): 9,607 users

[Facebook](#): 8,912 fans

[Twitter](#): 5,339 followers

[LinkedIn](#): 4,080 members

[Google Plus](#): +447

[YouTube](#): 264 subscribers

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## Macbassador of the Month: Christina Fitzsimmons '11



Robin Hart Ruthenbeck (left), associate director of campus programs, with Christina Fitzsimmons '11.

For her dedication to welcoming first-year students, we would like to recognize **Christina Fitzsimmons '11** as our Macbassador of the Month for September.

Fitzsimmons, a biology and chemistry double-major with

a biochemistry emphasis, is currently pursuing her Ph.D. in chemistry and chemical biology at the University of California, San Francisco. While planning a trip to the Midwest for a wedding, Fitzsimmons (a three-time Orientation Leader) realized she would be in the Twin Cities for Move-In Day. Knowing that the college can always use an extra pair of hands, she volunteered for the alumni Movers & Shakers program and spent four hours in 96 degree weather helping direct traffic and welcoming the Class of 2017 to campus.

"I remember how stressful orientation was for me," she said. "But at the same time I also remember how helpful everyone on campus was during the whole process. If I can pay it forward and ease someone's transition to college, I'm happy to give my time."

Please join us in congratulating Christina, our September  
Macbassador of the Month.

**Be a Macbassador**

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## Class Notes

These alumni have recently posted class notes in MacDirect,  
our online community for alumni ([login to view](#)):

**Susan Parsons**  
**Strachan '87**

*Wednesday, Sept. 4*

**Amanda Westley**  
**Ziegler '06**

*Wednesday, Aug. 28*

**Michael Kasten '85**  
*Monday, Aug. 26*

**Nicholas J. Reynolds '06**  
*Sunday, Aug. 25*

**Emmy Matzner Higgs**  
**Matzner '05**

*Monday, Aug. 19*

**Kent A. Meyer '77**  
*Saturday, Aug. 17*

**Peter D. Clark '91**  
*Friday, Aug. 16*

**Takara Matsuu-Tsuzaki '01**  
*Thursday, Aug. 15*

**Ruth Lee Copp '68**  
*Thursday, Aug. 15*

**Michael E. Greenberg '70**  
*Thursday, Aug. 15*

**Amelia S. Derr '94**  
*Thursday, Aug. 15*

**Laura W. Bartlow '02**  
*Thursday, Aug. 15*

What's your news? Post your class note in MacDirect and a  
link to it may appear in the next edition of *Mac Wire*.

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Macalester has a history of finding ways to make a positive impact on our planet's health. This commitment started with the creation of the Environmental Studies program in 1973.

Look at this sliver of the ways Macalester stewards our environment:

- Adopting a sustainability plan in 2009, committing to becoming a zero-waste campus by 2020 and carbon neutral by 2025
- Signing the Talloires Declaration in 2000 and the American College and University Presidents Climate Commitment in 2007
- Creating an Environmental Studies program in 1973 and establishing it as an academic department in 2004
- Adopting a green building policy that states that all new construction or major renovations must meet the Minnesota B3 guidelines or be designed to at least a LEED silver standard.



Most recently, campus-wide composting began in January, after determining that 45 percent of campus waste is compostable. Composting saves the natural and financial resources for Mac!

Your financial support allows Macalester to continue making positive changes on campus facilities and helps students participate in sustainability projects that help us all today and tomorrow.

**Please support Macalester this Earth Day!**

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## Paying it Forward



Wallin Scholars at Macalester

**CATEGORY:** Alumni (/news/category/alumni/), Student Life (/news/category/student-life/)

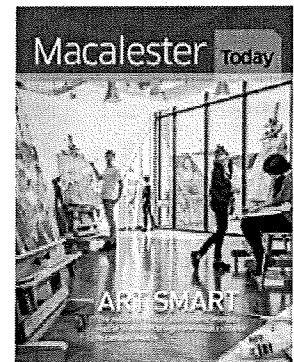
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BY REBECCA DEJARLAIS ORTIZ '06

PHOTO BY DAVID J. TURNER

### A foundation started by Maxine Wallin '48 and her late husband helps hundreds of Twin Cities kids pay for college

AS IS TRUE FOR MACALESTER ALUMNI from many eras, **Maxine Wallin '48** has among her most cherished memories those late-night college dorm conversations with friends. Seven decades ago—over Cokes from the new vending machines and cheese cooled on Wallace Hall windowsills—the young women of Macalester discussed *Brave New World*, the Nuremberg Trials, and the newly formed United Nations until lights out. For Wallin, those debates—and the intellectual curiosity they fostered—are just as memorable a part of college as any classes she took.



(<http://www.macalester.edu/nev>)

Published in *Macalester Today*

(<http://www.macalester.edu/news/n>)

Now, many years later, Wallin and her late husband, Win, have helped thousands of Twin Cities students access formative educational experiences all their own. The Wallin Education Partners has provided college scholarships for more than 3,300 students with financial need since 1992, when it supported its first students at Win's alma mater, Minneapolis South High School. In the 22 years since, the Wallin scholarship program has expanded to support students from more than two dozen Twin Cities area high schools, a growth funded by corporations, foundations, and individual donors. Most scholarship recipients are first-generation college students.

For **Matt Dehler '14** (Ramsey, Minn.), the Wallin scholarship expanded his options in a life-changing way. "I'm in college because of this program," says Dehler, one of 12 current Macalester students who receive Wallin support. "The only reason I knew I could attend Mac was because of this opportunity."

For a college like Macalester, which promises to meet the full financial need of each admitted student, outside scholarship programs provide additional important assistance, says financial aid director **Brian Lindeman '89**. "Macalester does a lot, but our resources aren't unlimited. We need the help of generous benefactors like the Wallin Education Partners."

Although the Wallin program provides each student up to \$16,000 over four years, its support extends beyond the financial. Throughout college, scholarship recipients work with a professional advisor who helps them assess their needs and learn to advocate for themselves. As Dehler prepares to graduate, the music major is regularly communicating with his Wallin advisor, seeking advice and perspective on his capstone research and post-Macalester plans.

Thanks in part to that support structure, Wallin students across their various colleges have a six-year graduation rate of 75 percent. Those numbers show the program's impact, says President Brian Rosenberg, who serves on Wallin's board: "The program addresses what is arguably the greatest social and economic need in Minnesota: to provide higher education to students who, by virtue of their economic situation, would otherwise be at a disadvantage when it comes to completing college."

Decades have passed since Win and Maxine first began dreaming of a scholarship program, but those students with financial need are just who they had in mind. After Win served in the U.S. Navy Air Corps, he could only afford college because of the GI Bill. "We realized there were other people in his situation who didn't have any government assistance to attend college," Maxine says. "There are a lot of young people now who need help to go on to school."

Win met Maxine at the University of Minnesota, where she had finished her degree in international relations and added a graduate degree in library science. He went on to have a long career as an executive at both Pillsbury and Medtronic, playing a leadership role in shaping both corporations. He died in December 2010.

Seventy years after staying up late in Wallace Hall, Maxine continues to be a lifelong learner. She's an avid traveler (she studied French and Spanish at Macalester and the college's Mexican Caravan program launched her international travel) and a voracious reader, keeps up with current events, and is a big fan of both Antiques Roadshow and *Downton Abbey*. She reads all the scholarship recipients' files and meets many of them at their colleges, including some at Macalester's annual luncheon.

Dehler attended his last Wallin luncheon this winter, this time as the student speaker. As he nears graduation, he's taking stock of the opportunities that shaped his four years at Macalester—singing in the concert choir, DJing at WMCN, taking part in student government—and most importantly, the staff and faculty members who influenced him so greatly that he's considering a career in student affairs. "I am who I am today because of the relationships I've formed at Macalester," he says. "The Wallin program is the reason I'm here and the reason I'm getting these opportunities. It's a huge, amazing honor."

**PUBLISHED:** 04/29/2014

## **Appendix F**

### **Coding Guide for Content Analysis**

1. **I am coder:**                      A                      B
2. **Message Unit Number:** \_\_\_\_\_
3. **Title or Brief Description of Message:** \_\_\_\_\_
4. **Communication Channel:**
  - a. Email
  - b. Print (or Snail Mail)
  - c. Website
  - d. Other
5. **Primary Stewardship Strategy:**
  - a. Reciprocity
  - b. Reporting
  - c. Responsibility
  - d. Relationship Nurturing
  - e. None
6. **Secondary Stewardship Strategy**
  - a. Reciprocity
  - b. Reporting
  - c. Responsibility
  - d. Relationship Nurturing
  - e. None



**7. Voice of Message**

- a. Student
- b. Professor
- c. Advancement Leader
- d. President
- e. Alumnus/a
- f. College Administrator (Not Advancement)
- g. Unidentified Macalester Community Member
- h. The College Generally
- i. Parent of a Student
- j. Other
- k. Unidentifiable

**8. Student Experience.**

*To what extent is the everyday student experience discussed?*

1 =not discussed

5 = vivid portrait of everyday student experience

1

2

3

4

5